

- Understanding the Portfolio in the Secondary School Classroom •

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## Abstract

Four secondary school teachers were involved in this case study. Individual interviews, group reflective sessions, and participant portfolios were transcribed verbatim and analyzed. The use of the portfolio in the secondary school classroom was then discussed in relation to emergent themes. These themes included teacher attitude, portfolio structure, portfolio purpose, challenges, effect, and professional development. Teachers were able to individualize the portfolio structure to meet both program and students' needs. The portfolio structure enabled both teachers and students to assume control over the learning process. The portfolio informed teachers about their teaching. This, in turn, challenged them to reflect on their teaching practices and enabled them to redesign curriculum implementation. A collaborative professional development structure fostered a learning environment that enabled teachers to experience success, despite the challenges that they inevitably encountered. These findings were related to contemporary literature. Finally, implications for theory and practice related to portfolio use in the secondary school classroom and professional development for secondary school teachers were considered.

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## **CHAPTER ONE: THE PROBLEM**

### **Introduction**

This study was designed to understand the experiences of 4 secondary school teachers who used the portfolio in their classrooms. This study involved 4 participants who implemented the portfolio in their classrooms for a period of 9 weeks. Throughout the study, themes emerged that qualified the teachers' experiences. These themes included: teacher attitude; portfolio structure; portfolio purpose; challenges; effect; and professional development.

### **Background of the Problem**

The government of Ontario introduced a new secondary school curriculum whose implementation began in September 1999. As part of this new curriculum, Curriculum Policy Documents (Ontario Ministry of Education and Training [OMET], 1999a) were introduced. These policy documents identify what students are expected to know and what they should be able to do by the end of a course and describe levels of achievement for these expectations. Within the framework of these documents, it is mandated that secondary school teachers design curriculum delivery to support the curriculum expectations and achievement criteria outlined by the government. Assessment and evaluation methods are central to this design. This, in turn, means that secondary school teachers are challenged to provide assessment and evaluation opportunities that reflect student achievement through authentic and varied means. This challenge is an important one requiring that secondary school teachers rework the role of assessment and evaluation in the classroom (OMET, 1999b).

Secondary school teachers must now assess student learning through the collection of varied demonstrations of achievement, and they must provide feedback and direction for improvement. In addition, teaching and learning strategies must support assessment of student performance (OMET, 1999b). Curriculum Policy Documents (OMET, 1999a) direct secondary school teachers to use personal reflection and decision making as part of these teaching and learning strategies. It is also required that assessment and evaluation of student achievement mirror teaching and learning strategies, that they reinforce the purposes of instruction, and that they meet the needs and experiences of all students. One purpose of assessment and evaluation is to allow students to assess their personal learning and to set learning goals for themselves. These directives require secondary school teachers to provide students with opportunities to demonstrate achievement through the use of assessment and evaluation strategies that promote learning. The portfolio is one such strategy that has gained momentum in Ontario secondary schools. An understanding of teachers' experiences with the portfolio provided insight into how the portfolio can be used in the secondary school classroom.

Although the portfolio is suitable for implementation within the context of new curriculum demands, there is limited knowledge about its effectiveness in the secondary school classroom. Traditionally, the portfolio has been widely used in elementary classrooms. In the elementary classroom, portfolios have been used as a type of authentic evaluation that facilitates communication of achievement to students, parents, and administrators (Lamme & Hysmith, 1991). The portfolio has provided elementary teachers with the opportunity to learn more about students

(Hebert, 1998). It has also functioned as a tool to help students grow and learn (Hebert). The benefits to students' learning include enabling students to see evidence of their own learning and allowing students to assess that learning (Hebert). With the movement towards authentic instruction and assessment, and with an increased awareness of holistic educational philosophies and authentic teaching practices, elementary teachers have been long motivated to use the portfolio in their classrooms (Lamme & Hysmith).

Because the portfolio is a relatively new concept in the secondary school classroom, what a portfolio is and how it can be used seem to be misunderstood by many educators. Misconceptions regarding the portfolio, including the time and effort required to plan and implement this tool seem to negatively affect secondary school teachers' willingness to use the portfolio in their classrooms. Secondary school teachers need to be provided with accurate information about how the portfolio can be used in the secondary school classroom. They need to understand what a portfolio is, what types of portfolios can be created, and what structures portfolios can take. Increased awareness of varied portfolio purposes will also allow secondary school teachers to realize the benefits of portfolios with respect to student learning. With increased understanding, secondary school teachers can learn to accept the inevitable challenges associated with portfolio use and develop strategies to confront these challenges if they arise. This study contributes to the limited research demonstrating how teachers can effectively use the portfolio in secondary school classrooms.

There are limited opportunities for secondary school teachers to learn about the portfolio and how it can be used in their classrooms. In fact, with the introduction of the new Ontario curriculum, professional development has been underfunded and rushed (Morey, 2001). I learned about the portfolio through my own interest and research; this strategy was not a part of preservice education or professional development offered at my school board. I wanted to extend this learning opportunity to my colleagues. I believed it was important to create a meaningful forum for professional development that included an opportunity for teachers to meet regularly to learn about portfolio use and to share portfolio experiences. Thus, this study demonstrates one method of effectively preparing secondary school teachers to implement the portfolio in their classrooms and supporting them through the implementation process.

### Purpose of the Study

The purpose of this study was to understand, through qualitative research using a case study design, teachers' experiences using the portfolio in the secondary school classroom. To facilitate the use of portfolios in a secondary school setting a collaborative professional development program was developed.

This study provided an understanding of the 4 participants' attitudes about portfolios before, during, and after implementation. The teachers provided detailed explanations of the portfolio systems that they developed, including their structures and identified purposes. They shared the challenges that they anticipated, encountered, and overcame while implementing the portfolio. There was considerable dialogue surrounding the effect of the portfolio on student learning and

classroom instruction. Students, curriculum, classroom environment, and teachers were all affected by the portfolios. In short, the collaborative professional development structure used in this study provided the forum for understanding the experiences of the four secondary school teachers as they implemented the portfolio in their classrooms.

The first phase of the professional development program involved individually interviewing the 4 participants at both the beginning and end of the study. These individual interviews provided details of their experiences with, and their perceptions of, portfolios in the secondary school classroom. Next, two training sessions were developed based on needs identified in the first individual interviews. During these two training sessions the 4 teachers were instructed in the use of portfolios in their classrooms. The third phase involved group reflective sessions which convened every 2 weeks throughout the portfolio implementation period. These group reflective sessions provided an opportunity for the teachers to share their portfolio implementation experiences. Teachers gave and received support through this venue. The final component of this professional development structure involved the 4 teachers maintaining participant portfolios. These participant portfolios contained reflections and artifacts representative of their portfolio implementation experiences.

I assumed three roles throughout the professional development process. I was the researcher, the theoretical expert, and a participant (Cranton, 1992). Moving between these roles allowed me to have a unique perspective on the experiences of all participants. As the researcher, I observed the participants' behaviours and reactions,

interpreted connections between those behaviours and reactions, tested those interpretations, determined their validity, formulated principles, and developed explanations (Cranton). As the theoretical expert, I facilitated the training sessions, developed the protocol for all individual interviews and group reflective sessions, and instructed all participants in how to develop their participant portfolios. This role enabled me to impart content to participants who had limited portfolio experiences and also to provide feedback when required (Cranton). Finally, as a participant, I was a full member of the learning group (Cranton). As such, I participated in all aspects of the professional development program.

An understanding of the portfolio in the secondary school classroom was gleaned from data collected through the individual interviews, training sessions, group reflective sessions, and participant portfolios, including transcripts, field notes, and documents.

Teachers were able to customize the portfolio structure to meet both program and students' needs. The portfolio structure encouraged both teachers and students to assume control over the learning process. The portfolio informed teachers about their teaching. This, in turn, challenged them to reflect on their teaching practices. Finally, the portfolio enabled teachers to manipulate the curriculum implementation process. A collaborative professional development structure fostered a learning environment that enabled teachers to experience success, despite the challenges that they encountered.

## Definition of Terms

*Achievement charts:* details levels of achievement of curriculum expectations within four categories of knowledge and skill including knowledge/understanding, thinking/inquiry, communication, and application. These charts serve as a reference point for all assessment practice and as a framework for assessing and evaluating student achievement.

*Assessment:* a process of gathering information from a variety of sources in order to glean an accurate reflection of student achievement of curriculum expectations in a course. Within this process, teachers provide students with descriptive feedback that serves to guide future efforts towards improvement.

*Career studies:* a new course in the Ontario Secondary School Curriculum that explores postsecondary opportunities.

*Civics:* a new course in the Ontario Secondary School Curriculum that explores citizenship in Canada.

*Cooperative education:* a course in the Ontario Secondary School Curriculum that provides students with the opportunity to gain workplace experience.

*Curriculum policy documents:* materials published by the Ontario Ministry of Education that detail the new secondary school curriculum.

*Evaluation:* process of making judgement regarding the quality of student work, based on established criteria. This process includes assigning a grade representative of the quality.

*Grading:* the process of assigning a percentage mark to student work following evaluation procedures.



*Group reflective sessions:* within this study, dialogue involving all 4 participants that occurred biweekly for a period of 8 weeks.

*Individual interviews:* within this study, initial and final interviews between me and each participant. In the case of interviews where I assumed the role of participant, my thesis supervisor assisted.

*Learning skills:* Skills including “works independently,” “teamwork,” “organization,” “work habits and homework,” and “initiative” identified by the Ontario Ministry of Education as areas for assessment.

*Ontario College of Teachers:* Professional college that regulates the teaching profession in Ontario.

*Overall expectations:* included in the Curriculum Policy Documents and generally describe the knowledge and skills that Ontario students are expected to demonstrate by the end of each course.

*Participant portfolio reflection:* within this study, refers to the entries the participants prepared and stored in their individual portfolios.

*Participant portfolios:* within this study, refers to the portfolios prepared by the 4 participants. These portfolios were submitted at the end of the research study for use as a data source.

*Peer assessment:* process that gives students the opportunity to apply the assessment process to their classmates’ work.

*Program Planning and Assessment Guide:* materials published by the Ontario Ministry of Education that provide detailed program planning and assessment,

evaluation, and reporting policy relative to student achievement in all disciplines in the Ontario secondary school curriculum.

*Rubric:* process that involves the application of detailed criteria when assessing or evaluating student work.

*Self-assessment:* process that provides students with the opportunity to apply the assessment process to their own work.

*Specific expectations:* included in the Curriculum Policy Documents (1999) and describe in greater detail the knowledge and skills that Ontario students are expected to demonstrate by the end of each course.

*Teacher Advisor Groups:* program established by the Ontario Ministry of Education (1999) to facilitate the partnering of teachers and students in order to assist in decision-making, goal setting in relation to planning courses, future goals, and academic progress.

*Teaching and learning strategies:* those activities that teachers design and deliver to support achievement of curriculum expectations.

### Outline of the Remainder of the Document

Chapter Two provides a review of the current literature related to the portfolio with a focus on application in the secondary school classroom. Included in this review is background information regarding portfolio use, existing portfolio definitions, reference to the types and structures of the portfolio, purposes of portfolio use, challenges experienced with portfolio use, and strategies to effectively support teachers as they plan for and implement the portfolio in their classrooms.

Chapter Three details the research methodology and procedures employed throughout this study. Participants, materials, procedures, analysis, and limitations are addressed.

Chapter Four presents the findings of the study through narratives that detail the experiences of the 4 participants reflective of emergent themes. These themes include teacher attitude; portfolio structure; portfolio purpose; challenges; effect; and professional development

Chapter Five provides a summary of conclusions. The findings are discussed in the context of contemporary literature, followed by implications to both theory and practice.

## **CHAPTER TWO: LITERATURE REVIEW**

### **Overview**

This qualitative study explored the use of the portfolio in the secondary school classroom. This chapter details literature surrounding the portfolio. In order to provide information about the portfolio and its use in the classroom, this literature review first explores background information. Next, the portfolio is defined. Following this, different types of portfolios are outlined. The structure of the portfolio is then explained, followed by an exploration of portfolio purposes and then an interpretation of the challenges experienced when using portfolios in the classroom. This chapter concludes with an examination of professional development.

### **Background**

The educational portfolio was derived from the visual and performing arts portfolio used to demonstrate artists' works and accomplishments (Sweet, 1993). Portfolios have recently gained popularity for use in the educational context. Burke, Fogarty, and Belgrad (1994) determined that teachers are adapting the visual and performing arts portfolio for use in the classroom. New educational practices have shifted the focus from traditional forms of evaluation to an emphasis on the students' roles in constructing and assessing their own learning. This created a need for new ways of demonstrating performance. Because this study focuses on the use of the portfolio in the secondary school classroom, this discussion about portfolios is based, for the most part, on research in the secondary classroom. Conclusions regarding portfolio use across grade levels are articulated in order to provide perspective for general portfolio purpose,

structure, and use. The history of portfolio use in the elementary classroom is explored initially to provide context.

### *Elementary Classroom*

In the elementary system, teachers became interested in portfolio use when education moved towards authentic instruction and assessment. This awareness of holistic educational philosophies and authentic teaching materials encouraged teachers to change their instructional methods (Lamme & Hysmith, 1991). With this modified curricular focus, teachers reevaluated their assessment and evaluation strategies (Lamme & Hysmith). It was seen as critical to ensure that evaluation and instruction complemented one another (Cambourne & Turbill, 1990). The portfolio emerged as one type of authentic evaluation (Lamme & Hysmith). According to Lamme and Hysmith, the portfolio served as a way to communicate literacy achievement to students, parents, and administrators. This involved determining what to assess and gathering data through informal observation, through student-selected artifacts, and through student-created records of accomplishment.

Hebert (1998) is the principal at Crow Island School (kindergarten to grade 5) in Winnetka, Illinois. She has been involved in a portfolio project at her school since 1988. Her experience with portfolios enabled her to conclude that the portfolio must mirror student decision-making and accomplishments. In order to realize this, Hebert suggested allowing students to choose pieces of work to be included in their portfolios and to compose a reflection describing the reasons for including the chosen pieces. This does not imply that a teacher simply instructs students to select some assignments, write down what they feel, and put it in a folder. Instead, there is explicit instruction that takes place

explaining what a portfolio is and how it can be used. By including the students in this process, they established their own portfolio goals while producing a quality piece of work that best represented their learning.

Hebert (1998) defined the portfolio as an alternative form of assessment that enabled students to gather together pieces of work throughout a period of time. This collection of work not only enabled teachers and students to record growth over time, but also provided them with a voice through which to share their stories. Hebert advocated that teachers not assign a letter or numerical grade to the student portfolio. Instead, she viewed the portfolio as an opportunity to learn more about students and as a tool to help them grow and learn.

### *Secondary Classroom*

The new secondary school curriculum (1999) mandated that teachers design curriculum delivery to support specified curriculum expectations and achievement criteria. Teachers were challenged to reconsider the role of assessment and evaluation in the classroom (OMET, 1999b). Specifically, teachers were required to assess student learning and to provide feedback prior to evaluating and grading student work. The portfolio allows students to reflect and make decisions. It allows students to assess their learning and to set goals. It also can be used as both an assessment and an evaluation strategy and is directly linked to learning. Recently, the portfolio has gained momentum in many secondary schools.

Barton and Collins (1997) acknowledged that the portfolio is a relatively new concept. For this reason, there has been limited research conducted that clarifies what happens in a classroom when portfolios are used (Athanases, 1997).

## Portfolio Defined

There are many definitions for the portfolio. Alfie Kohn (1999) defined the portfolio as “carefully chosen collections of students’ writings and projects that demonstrate their interests, achievement, and improvement over time” (p. 42). Sweet (1993) described the portfolio as a collection of student work that represents selected performances. The portfolio has been explained as a “purposeful collections of ... work – that can show strengths, weaknesses, growth, and progress over time” (O’Connor, 1999, p. 6). These definitions emphasize that the portfolio is a thoughtful collection of materials that demonstrate learning and growth over time.

The portfolio is also considered an example of a performance assessment. A performance assessment is used to improve teaching and learning (Jamentz, 1994). The portfolio has also been referred to as a performance-based task and as an example of authentic assessment (Guskey, 1994). A performance-based task provides the opportunity for students to demonstrate a performance of a complex learning task (Guskey). Authentic assessment, according to O’Connor (1999), allows students to demonstrate what they know, what they can do, and what they are like.

## Portfolio Types

### *Product Portfolio versus Process Portfolio*

Mondock (1997) described the product portfolio as a collection of final products. This portfolio allowed for a comparison of final products, with no clear evidence of student growth because the focus was simply on the final product and not the processes involved in creating that final product. The process portfolio, conversely, is a collection that demonstrates growth (Mondock). Student reflection is a central component of the

portfolio process. Thus, the process portfolio allowed students to review the contents of their portfolio and to “reflect on strengths, needs, and goals that result from creating the final product over time” (p. 59). This reflection involved student self-evaluation. The process of evaluating their own work required students to justify their efforts.

### *Personal Portfolio*

Personal portfolios are intended to provide a holistic picture of students (Burke et al., 1994). This portfolio contains evidence of the students’ extracurricular activities and interests, community involvement, family details, and personal achievements. The personal portfolio allows students to reflect on future plans that might include family, education, and career. Students also have the opportunity to reflect on what they need to do in order to achieve the goals they have established for themselves. This type of portfolio provides teachers, students, and classmates a view into the peers’ lives. The personal portfolio allows teachers, students, and classmates to celebrate the interests and successes of each individual student (Burke et al.).

### *Academic Portfolios*

Academic portfolios can take many forms (Burke et al., 1994). These portfolios can be created individually or in groups, they can focus on one subject or on multiple subject areas, and they can demonstrate work over one school year or work over many school years. The academic portfolio contains evidence of student work and allows students to showcase their strengths. Students collect samples of their work and use this as evidence of a skill or behaviour. For example, if teachers wanted their students to demonstrate that they are socially responsible, the students might provide examples of



work that exemplifies persistence, good listening skills, effective problem solving skills, and/or metacognitive awareness (Burke et al.).

### *Professional Portfolios*

Professional portfolios provide an opportunity for students to demonstrate their preparedness for college, university, or the workplace (Burke et al., 1994). The professional portfolio is a compilation of academic achievements, extracurricular achievements, community activities, attendance records, and discipline records. This evidence provides information regarding students' abilities to succeed and to contribute to their chosen career profiles. The professional portfolio may also contain students' curriculum vitae and practice interview questions.

### *Electronic Portfolios*

An examination into how schools began using authentic assessments in the early 1990s resulted in the initiation of the digital portfolio (Wiedmer, 1998). “[A] digital or electronic portfolio is a purposeful collection of work, captured by electronic means, that serves as an exhibit of individual efforts, progress, and achievements in one or more areas” (Wiedmer, p. 586). The electronic portfolio serves the same purpose as any other type of portfolio, but is different because the information is stored electronically (Lankes, 1999).

The electronic portfolio offers all the benefits of a hard-copy portfolio, but has some additional advantages (Wiedmer, 1998). According to Wiedmer, the advantages include enabling students to view their personal growth through audio and visual mediums, involving students in decision-making regarding these media, and allowing students to determine the effective demonstration of their performance. Lankes (1999)

recognized that many commercial portfolio programs exist and that they provide a template for the creation of student portfolios, but she also acknowledged the alternative, which is for students to create their own template. Lankes documented how students at East Syracuse-Minoa High School in East Syracuse, New York sent electronic portfolios to colleges for admission purposes or to employers as part of an application package. Lankes provided another example of students at Mt. Edgecumbe High School in Sitka, Alaska using HTML programming to create their portfolios.

In order for the electronic portfolio to be a worthwhile experience for the students, Wiedmer (1998) discussed five criteria that need to be addressed. First, students must be aware of what they are expected to know and be able to do. Students must be actively involved in making choices that will demonstrate what they know and are able to do. Second, demonstrations of experiences are limited only by students' creativity. Third, the school must be able to provide the hardware and software necessary for the implementation of electronic portfolios in the classroom. Fourth, students need to consider the logistics, such as memory, involved in selecting artifacts to include in the electronic portfolio. Fifth, when it comes time to assess and or evaluate the portfolio, time is necessary to properly review the electronic portfolio must be taken. This includes ensuring that the reviewer is comfortable with this communications medium and that portfolio criteria are predetermined.

### Portfolio Structure

The structure of a student portfolio is dependent on the identified purpose, the context, and the audience (Midwood, O'Connor & Simpson, 1994). It is crucial that the portfolio is developed with these variables in mind. Sweet (1993) concluded that there is

no definitive way to structure a portfolio. He recognized, though, that all portfolios are similar because they challenge students to collect, select, and reflect.

Materials included in a portfolio are based on the classroom content. The portfolio is often centered around classroom assignments (Sweet, 1993). Portfolios, though, can focus on more than one curriculum area (Sweet). Midwood and his colleagues (1994) provided numerous examples of possible portfolio inserts, which included draft and final versions of student work samples, corrected tests, group projects, independent learning assignments, and self- and peer evaluations. The portfolio may also contain examples of a students' best work, student evaluation of the strengths and weaknesses of work samples, and samples of work at various stages of preparation (Sweet).

Secondary school students can assume an active role in the development of the portfolio. For instance, they can be involved in classroom discussions that determine the use and criteria of the portfolio (Sweet, 1993). Burke and her colleagues (1994) stressed the importance of organizing and planning the structure of the portfolio. Structural considerations include deciding on a container to house the portfolio, how to label the contents, and how to order the contents. Midwood and his colleagues (1994) emphasized the importance of dating all materials and of organization through the use of a table of contents. This initial organization of portfolio structure ensures that students understand the intended purpose and type of portfolio they are creating and that students will effectively use the portfolio to this end (Burke et al.).

## Portfolio Purposes

The portfolio originated for use in the visual and performing arts. This model is easily adapted to any classroom or curriculum context (Sweet, 1993). In the classroom, the portfolio has been used as an assessment strategy, as an evaluation strategy, and as a learning strategy.

### *Assessment Strategy*

Alfie Kohn (1999) encouraged a change of focus from traditional grades to learning. He advocated that educators continue the process of gathering information about student performance and communicating this information to students and parents. He also advocated the use of authentic assessment strategies to provide meaningful feedback about student performance. The portfolio is one such strategy. With the focus on learning as opposed to grades, the portfolio motivates students to learn. Gardner (1994, cited in Siegel & Shaughnessy, 1994) supported the portfolio as an opportunity for teachers to assess student work and to provide them with feedback. This feedback focused on learning and understanding as it is demonstrated through the portfolio. To demonstrate how the portfolio can be used as an assessment strategy that provides students with feedback that promotes learning, two studies are discussed.

Butler (1997) discovered the value of the portfolio as an assessment strategy when she implemented the portfolio in her grade 10 honours chemistry classes. She was inspired by constructivism theory that encouraged educators to promote learning by having their students actively involved in the learning process.

The portfolio implementation process began with a session that elicited students' opinions about what an employer might want to see in a portfolio (Butler, 1997).

Following this, Butler and her students compared the portfolio to the résumé. The students concluded that a résumé provided a list of accomplishments, whereas a portfolio demonstrated actual skills. Next, Butler provided her students with a list of expectations and criteria for the portfolio. The students were expected to document evidence of their learning based on a specific number of class activities. They were also expected to complete journal entries. The topics alternated between teachers' choices and students' choices.

The portfolios were collected once a week for assessment. The weekly assessments of student portfolios were based on a rating of excellent, satisfactory, or unsatisfactory with respect to how much evidence of learning students included. Students who included activities that served to document 94 % or more of the specified evidence received an excellent rating. Students who included activities that served to document 75 to 93 % of the specified evidence earned a satisfactory rating. Students whose portfolios were incomplete or late received an unsatisfactory rating. Butler (1997) also provided anecdotal feedback that congratulated students on any extra efforts or guided them in ways to improve their portfolios. Butler did not provide details about overall class performance, but she did note that a few students received unsatisfactory ratings because they continued to disregard due dates.

Butler concluded that this assessment strategy served to improve communication between students and herself, enabled students to develop awareness of their own learning styles, and helped students to develop thinking strategies including analysis, synthesis, and evaluation. In addition, Butler was able to construct more meaningful

forms of student assessment because her focus was no longer on regurgitation of facts, but instead on affording her students the opportunity to explain concepts.

Burch (1997) described assessment as “a process that is, at its best, ongoing, individual, and thoughtful” (p. 58). She demonstrated that the most effective aspect of portfolios is the rubric used to assess the portfolio. “Rubrics clarify expectations, provide parameters, and offer guidance both to students preparing portfolios and to teachers evaluating them” (Burch, p. 55).

Burch (1997) created a portfolio rubric with her writing class. The challenge for Burch was to create a portfolio that allowed student creativity and that met the needs of all students. She outlined the steps followed in creating this rubric. Both students and teachers benefited from involvement in the process. Her suggestion is a two-tiered portfolio rubric.

Before beginning to construct the rubric, Burch (1997) suggested making a list of what the portfolio should contain and the quality expected. Next, sufficient class time (at least 30 minutes) was devoted to a class discussion about the rubric. Burch recommended that a class secretary take notes of this discussion in order to record class decisions. This class discussion enabled students to verbalize the content and quality expectations. Next, the portfolio contents were chosen based on the class discussions and on the teacher thoughts. Burch’s class agreed to include four writing pieces, three metawriting/reflection pieces, two peer-writing pieces, and two writer’s choices. This composed the content portion of the portfolio.

Following this, the students and the teacher continued their discussion to determine assessment and evaluation criteria. Burch (1997) suggested that the teacher’s

role at this stage was to ensure that students did not repeat criteria, that there were not too many criteria that might result in a loss of focus, and to determine what value would be placed on content and on quality. In Burch's class, the students agreed to use "voice," "organization," "reflection," "development," and "mechanics" as criteria to assess quality of entries. Once the criteria were selected, the students and teacher proceeded to describe each of the criteria. At this point, the portfolio was graded, with points allotted for each content item and for each quality criterion. The teacher determined the value placed on the contents and the students could insert the value for quality, following a "maximum-minimum scale" suggested by the teacher. Burch stressed that there needed to be a space for qualitative comments.

Burch concluded by suggesting that the rubric is a draft that can be reworked as necessary. The rubric, she believed could be used in many different ways in conjunction with the portfolio.

### *Evaluation Strategy*

One of the decisions that teachers need to make when implementing the portfolio in their classrooms involves whether or not to grade the portfolio. It is commonly accepted that portfolios are not as effective when used as an evaluation strategy as compared with when they are used as a learning assessment strategy (Lima & Snider, 1997). Teachers who choose to evaluate portfolios may be doing so in an effort to be accountable (Burke et al., 1994).

Burke et al. (1994) explain how to evaluate student portfolios. When teachers decide to grade the portfolio, teachers, in consultation with students, base the grade on standards that are either determined by the teachers alone or are based on school or

district standards (Burke et al.). These standards are articulated through a scoring rubric that details exactly what is expected of a student based on previously established criteria and standards. The advantage of the rubric is that it increases fairness in the evaluation process (Burke et al.). In addition, students know exactly what is expected of them.

Because the portfolio is a relatively new concept, no universally accepted standards for evaluation exist (Barton & Collins, 1997). In Ontario, teachers are expected to apply achievement chart standards to student performance. The achievement charts detail levels of achievement of curriculum expectations within four categories including knowledge/understanding, thinking/inquiry, communication, and application (OMET, 1999a).

### *Learning Strategy*

The portfolio has been used as a learning strategy. Howard Gardner (1994, cited in Siegel & Shaughnessy, 1994) believed that portfolios provide students with opportunities to develop knowledge and understanding through the process of collecting projects over a period of time. The result is a product that allows students an opportunity to apply their knowledge and demonstrate their understanding of critical concepts. To demonstrate how the portfolio has been used as a learning strategy, two studies are discussed.

The portfolio is widely recognized as an alternative assessment strategy (Martin-Kniep, 1992). Based on her experience working with professional staff from a number of different schools, Martin-Kniep conceded that little is known about designing and implementing these alternative forms of student assessment. She acknowledged that these alternative assessment strategies demand a clear connection between instruction and



assessment. In fact, she believes that “authentic assessment should be substantiated by authentic instruction” (Martin-Kniep, p. 4). Her study described a process designed to implement alternative assessment strategies in the classroom. This process first involved the identification of expectations and the articulation of these expectations. This included dialogue among teachers, administration, parents, and students. The second stage involved the articulation of specific demonstrations. The stakeholders decided what evidence is necessary to demonstrate the desired expectations. Next was the articulation of standards. This was recognized as the most challenging aspect of this process because the required dialogue amongst teachers is against traditional practice. Finally, the process involved the identification and design of authentic assessment strategies with a focus on real-life strategies that enabled the documentation of expectations. Based on this process, Martin-Kniep concluded that alternative assessment strategies are both a process and a product. The process involved enabled teachers to define what and how they taught and assessed. The product is an assessment task, such as the portfolio, that allows students to demonstrate achievement of the identified expectations.

Jamentz (1994), director of the California Assessment Collaborative (CAC), explored how assessment strategies could be used to improve teaching and learning. She described a study conducted by the CAC in 1990 whose purpose was to answer this question. In 30 classrooms across California, teachers across various subjects and grade levels created performance assessments, including portfolios, that served to improve teaching and learning. Four key practices emerged as a result of this study.

First, it was determined that it is necessary for teachers to have the opportunity to decide on standards and on assessment design (Jamentz, 1994). The portfolio was used

as an example of this key practice. Teachers, working together, discussed the purpose of tasks, decided what portfolios would look like, and decided on the criteria for the portfolio review. The teachers involved in this study stated that their involvement in creating the performance assessments was as important to improving teaching and learning as was the new assessment.

The second key practice that emerged from this study involved “[building] teachers’ capacity to use assessment to improve instruction” (Jamentz, 1994, p. 56). Specifically, this involved teachers using assessment information to plan teaching and learning strategies. The study determined that this could be facilitated through affording teachers opportunities to gain an understanding of how standards are translated into instruction. This includes developing the abilities of teachers to review student performance and providing them with opportunities to collaborate with colleagues when reviewing student performance and when planning teaching and learning strategies. The portfolio was used to demonstrate this key practice. “Instructionally sound portfolio assessments require that teachers have the knowledge, time, and skills to determine from a portfolio what students already know and still need to learn” (Jamentz, p. 56).

Providing students with the opportunity to review their performance in order to assess their learning was identified as the third key practice (Jamentz, 1994). This suggestion emphasized that students must understand the performance standards and that they must practice self-assessment.

The final key practice identified through this study involved monitoring the opportunities that performance assessment provides for learning. The purpose of a performance assessment such as the portfolio is not to rank students, but instead to

determine what students know and can do and what it is that they still need to learn. As a result, these assessment strategies are used to improve teaching and learning (Jamentz, 1994).

This study concluded that the challenge in assessment reform is not “what to put in a portfolio, how to score it, or even what professional development teachers need to use the portfolios effectively” (Jamentz, 1994, p. 57). The challenge, instead, is to explore questions about what we expect students to know and be able to do, what evidence demonstrates student achievement, what resources are needed to enable students to meet expectations, what teaching and learning strategies enable students to meet the expectations, and what roles teachers, administrators, parents, and policy makers play in this process.

### Challenges

Implementation of the portfolio in the classroom has not occurred without challenges. These challenges include time, grading, resources, and student participation. The identification of these challenges is supported by strategies recommended to support the implementation of the portfolio in the classroom.

Most researchers who studied the implementation of the portfolio acknowledged that time is a barrier. It takes time to introduce the portfolio concept to a class, to prepare portfolios, and to collect portfolios. Wolfe (1999) speculated that this time commitment is one main reason why teachers chose not to use it. Travis (1996) recognized that alternatives to traditional testing, such as portfolios, are criticized because of the time required and the continual reworking of the requirements and components of the strategy. Sweet (1993) acknowledged that portfolios require time on the part of both teachers and

students. Teachers need to thoroughly understand the concept of the portfolio, and this requires time for planning, for conferencing with other teachers, for developing teaching and learning strategies, for developing materials to support the portfolio implementation, to conference with students, and to review the portfolios created by students. Gardner (1994, cited in Siegel & Shaughnessy, 1994) acknowledged that many teachers complain about the fact that it is too time consuming to review student portfolios. Gardner responded to this challenge by stating that teachers who do not have time to look at their students' work should in fact stop teaching because, in effect, that is what they have done. "If you do not have time to look at your students' work, you should stop teaching. In fact, you have already stopped teaching" (Gardner, 1994, cited in Siegel & Shaughnessy, 1994).

Wolfe (1999) interviewed 10 secondary school teachers who participated in a study related to portfolio implementation in the classroom. This study revealed four types of support needed to help teachers successfully implement the portfolio in their classrooms.

The first type of support identified concerned the time factor. "The amount of time needed to plan, implement, and grade portfolios is typically the biggest obstacle to portfolio implementation" (Wolfe, 1999, p. 30). The teachers interviewed suggested that release time was the most effective way to address the time challenge. Release time allowed teachers to conference with each other, to plan instruction that matched curricular expectations, and to score/grade portfolios. Funding for release time as well as the removal of the teacher from the classroom were two anticipated problems resulting from the recommendation of release time. These teachers suggested two additional

solutions. First, teachers could be compensated for spending this extra time outside of school hours, and second, that teachers be granted professional development credits for their efforts. Overwhelmingly, though, the teachers interviewed believed that by providing release time, administrators demonstrated that they value the portfolio.

The second type of support identified by the teachers interviewed was networking (Wolfe, 1999). The teachers interviewed stated that networks should consist of teachers beginning to develop the portfolio for classroom use, teachers with expertise in the area of portfolio implementation, and outside experts. This network focused on discussing challenges that arose in portfolio implementation, discussing ways to improve student portfolios, sharing student work samples, discussing teaching strategies, and linking the portfolio experience to district, state, or national standards. To support this network, release time, meeting space, refreshments, and clerical support were required.

The third type of support identified by the Wolfe (1999) interviews was recognition. The teachers involved in this study stated that they were more concerned with receiving “support” instead of “compensation.” This recognition, stated the teachers, could take the form of press releases, staff meetings, and letters placed in personnel files. These teachers were also interested in having their administrators educate the public about portfolio assessment.

The final type of support identified by the teachers involved materials (Wolfe, 1999). In order to implement the portfolio process, some materials were required in order to facilitate portfolio storage and documentation. Administrators who provided teachers with the materials demonstrated to these teachers that they supported their efforts to implement this assessment strategy. Storage spaces for the portfolios as well as clerical

support for photocopying and keeping track of meetings and conferences were also identified as important material supports.

Based on her experiences implementing the portfolio in her grade 10 honours chemistry classrooms, Butler (1997) also identified certain challenges. The first challenge involved finding the time to review student portfolios. She found it easiest to review a specific number of portfolios each day after school. The second challenge involved staying objective when reviewing the portfolios. Third, Butler was challenged by the fact that some students simply refused to complete this assignment. Despite her best efforts, these students did not complete their portfolios and, as a result, did not succeed in earning their credit. Fourth, some students did not hand in sufficient work. They sometimes even tried to copy other students' work. Butler's response was to maintain the standards initially developed and to encourage all students to meet these standards.

Jamentz (1994) stated that "a portfolio amounts to little more than a work folder if teachers and students have neither the necessary time nor skills to understand what it says about what students know and need to learn" (p. 55). It is important that the challenges identified by teachers who have experience implementing the portfolio are addressed. Wolfe (1999) stated that one way to overcome the challenges associated with portfolio use is experience. "[Teachers] who are familiar with the portfolio philosophy see the influence of portfolio assessment on curriculum and instruction as being merely a means to an end" (p. 30). With experience using the portfolio, teachers develop a commitment to the portfolio philosophy and develop strategies to cope with this new approach to learning.

## Professional Development

Professional development is necessary in order to implement educational changes (Legendre, 1999). Through an examination of the history of school reform in Quebec, Legendre determined that professional development must be available for all teachers, must be planned, and must be based on commitment and dialogue. Professional development opportunities must respond to the needs of the teachers and the organization and should recognize the expertise and the competence of teachers. Professional development opportunities should be varied in terms of location and methodology. Finally, professional development activities should serve to progress teachers' careers, and must be evaluated.

Professional development is underfunded in Ontario (Morey, 2001). In fact, most curriculum changes in Ontario have been supported solely by rushed in-service training. Morey concluded that the limited time spent on providing needed professional development opportunities resulted in educational staff not being prepared to implement curricular changes. In the final section of this chapter, the concept of professional development is explored with an emphasis on roles, teacher experiences, autonomy, needs, relationships, and the collaborative process.

### *Roles*

Within an adult learning environment, the educator assumes roles. Cranton (1992) examined the roles played by adult educators, specifically, the roles of colearner, expert, and researcher.

The role of colearner (Cranton, 1992) enables the educator to be a full member of the adult learning group. The colearner participates fully as a learner but is able to move

in and out of the colearner role. Trust and comfort between educators and learners ensure the successful transition between roles. The colearner role should be explicitly explained to the learners so that they do not feel manipulated. If the colearner is dishonest about her role, then the learners will lose trust in the colearner. This role, Cranton determined, is most effective when all participants are equally involved and vested in the learning process. The colearner role enhances all participants' involvement, growth, and development, results in increased learner trust in the educator, and facilitates self-directed learning. The colearner role enables the educator to experience change and growth within the learning process.

The role of expert is familiar to most educators. Cranton (1992) determined that within an adult education learning environment, the expert role could be a sufficient role in itself, but was also effective in conjunction with other roles. The expert brings content and is able to facilitate learning activities. The expert supports learners who require guidance through feedback. In an adult learning situation where time is limited and where learners are unfamiliar with the content, the expert role is most effective and, in fact, necessary (Cranton).

“The goal of research is to develop a theory for a set of observations” (Cranton, 1992, p. 97). Cranton demonstrated that an educator assumes the role of researcher when she wants to explain learner interactions. The researcher observes both learner and educator behaviours and reactions, formulates hypotheses regarding connections between observed behaviours and reactions, tests hypotheses using observation, determines validity of stated hypotheses, formulates principles, and finally develops an explanation.



Cranton (1992) explained that, as the learning process unfolds, both educators and learners assume various roles and engage in various activities. Educators make decisions to implement certain activities and to introduce specific content. Educators provide feedback to the learners. Both educators and learners engage in reflection, change, and growth and are involved in planning and interaction (Cranton).

### *Experience*

Experience is a fundamental concept in adult education. Martineau (1998) acknowledged that teachers have a lot of experiential knowledge. The adult learning process adds new learner experiences and reinterprets past experiences (Cranton, 1992). Dewey (1938) recognized experience as a way of learning. He emphasized that quality life-experiences lead to learning. Cranton validated that adult learners and educators both contribute unique experiences as they learn together.

The learner and the educator, each with their own set of experiences, characteristics, values, and beliefs, work together in a learning process which includes change as a part of the process, with an outcome of changed thinking, values, behaviours, and actions. (Cranton, p. 20)

Reflection is a vehicle that enables learners to use their experiences to contribute to learning (Cranton). Through reflection, new perspective is gained and learners are able to reevaluate past experiences. This results in behavioural change and goal setting.

### *Autonomy*

Cranton (1992) recognized the importance of autonomy in adult education. She defined autonomy as functioning independently. She acknowledged that some learners are autonomous while others are not. Linda Grant (2001, cited in Morey, 2001)

suggested that teachers need to “own” the changes that they are delivering in their classrooms. This can be accomplished through effective professional development opportunities. Cranton adds that autonomy relates directly to learner needs. It is the responsibility of the educator to recognize learners’ needs and to empower learners so that they can seize autonomy.

### *Needs*

Cranton (1992) considers the emotional needs of learners. She suggests that the educator is responsible for ensuring that the emotional needs of the learners are met and described these emotional needs through three stages of learning. When learners are first adjusting to a new learning environment, they need to be supported and accepted. Trust and respect also need to be established. The educator must facilitate this interaction. As learners gain confidence, they need to share their excitement with others. An effective interactive peer group can help learners feel affirmed and be receptive to positive feedback. Later in the learning process, learners need to receive honest feedback related to skill acquisition.

Martineau (1998) demonstrated that professional development opportunities for teachers must be based on what teachers need to learn. In recognizing that teachers have limited control over their professional development, Martineau advocates collaboration between teachers and researchers so that the practice of teaching and the professional development needs of teachers can be understood.

### *Relationships*

An adult education environment is in itself a social context (Cranton, 1992). Relationships between learners is an important concept in adult education. Cranton

determined that interest and excitement about the learning process were intensified when interaction between learners and educators existed. Within this relationship context, learners verified and shared learning experiences.

### *Collaboration*

Elliott and Woloshyn (1997) describe collaboration as “working equitably with at least one other person on the same project or task” (p. 24). Collaboration within an adult learning environment relates to many of the professional development topics already discussed. Two studies are outlined in order to understand the relationship between collaboration and professional development.

Elliott and Woloshyn (1997) initiated a study that explored the practice of collaboration. The participants in this study were seven female professors who described their unique experiences working on collaborative projects. After careful analysis of these experiences, dimensions of collaboration were considered including rapport, establishing goals and rewards, negotiating tasks, commitment, and satisfaction.

Collaborative relationships should not be limited to professional interest but should also include sharing personal experiences and information (Elliott & Woloshyn, 1997). The collaborative nature of the relationship between partners serves to motivate and encourage. Collaboration is strengthened by partners’ abilities to share problems and to brainstorm solutions. Dialogue within collaboration is related to shared experiences. Sharing common experiences results in bonding between collaborators, with this bonding often being necessary for task completion.

Elliott and Woloshyn (1997) determined that collaboration depends on partners who share a goal to initiate change. It is not necessary for the goals to be the same, only compatible. The goals need to be explicit and accepted by all partners.

In a collaborative partnership, members assume responsibility for certain tasks. In Elliott and Woloshyn's study (1997) they observed that tasks are negotiated according to the expertise of the partners. Personal responsibility, both to the goals of the collaboration and to the relationships between partners, is required. In addition, in order for the collaboration to be successful, time is needed.

Elliott and Woloshyn (1997) demonstrated that collaboration cannot be imposed. They determined that there existed three levels of commitment. The first level involved a commitment to working together collaboratively. The second commitment involved the goals of the project. The third commitment related to the collaborative partners. Care for partners was seen as more significant than the project itself. Commitment to partners was the strongest and was directly related to rapport.

Satisfaction related to the strength of the relationships between partners (Elliott & Woloshyn, 1997). Perceived project success was dependent on the relationships between partners. "If the relationship was strong, the partners derived some sense of satisfaction, regardless of whether the project goals were entirely met" (Elliott & Woloshyn, p. 33).

Professional development opportunities are created when teachers recognize a need to study outside of the classroom (Woloshyn & Elliott, 2001). Through this process, classroom teachers translate theory into practice. Based on their study that involved six intermediate classroom teachers, Woloshyn & Elliott concluded that professional development is achieved through collaboration. This study involved a 4-

year professional development project in explicit strategy instruction. All participants and the two researchers were learners. The researchers provided theoretical content, and the teachers provided information on best classroom application. The participants worked together through theory reading and curriculum design. Experiences related to explicit strategy instruction were shared as a group.

Woloshyn and Elliott (2001) determined that “teachers learn best from other teachers” (p. 181) and that learning is a “social activity” (p. 181). The process of sharing experiences encouraged the participants to try new teaching approaches. The group meetings deepened respect for each other both as teachers and as learners. Friendships amongst participants developed. Woloshyn and Elliott concluded that “the personal and the professional became intertwined” (p. 181). The group meetings served to establish an environment that encouraged change. Within this context, a “community of learners” (Woloshyn & Elliott, p. 182) invited questioning and sharing. A solid rapport developed between learners, and this resulted in genuine commitment to the group.

### Chapter Summary

This chapter detailed the literature reviewed in order to gain an understanding of the portfolio in the secondary school classroom. The educational portfolio originated from the visual and performing arts (Sweet, 1993) and has been adapted for use in the classroom (Burke, et al., 1994). Portfolio definitions recognized that the portfolio is a collection of student work that is carefully gathered in order to represent student learning (O’Connor, 1999; Sweet, 1993). The various types of portfolios that have been developed include the personal portfolio (Burke et al.), the academic portfolio (Burke et al.), the professional portfolio (Burke et al.), and the electronic portfolio (Lankes, 1999;

Wiedmer, 1998). The portfolio structure is dynamic and dependent on the identified purpose, context, and audience (Midwood et al., 1994). Students have been actively involved in creating the portfolio (Burke et al.; Sweet). The portfolio has been widely used as both an assessment (Burch, 1997; Butler, 1997; Hebert, 1998), evaluation (Burke et al.), and learning strategy (Hebert; Jamentz, 1994; Martin-Kniep, 1992; Gardner, 1994, cited in Siegel & Shaughnessy, 1994). Portfolio use is not without challenges, including time (Butler; Gardner, 1994, cited in Siegel & Shaughnessy; Sweet; Travis, 1996; Wolfe, 1999), networking (Wolfe), recognition (Wolfe), and materials (Wolfe).

Professional development is needed in order to ensure successful implementation of educational changes (Legendre, 1999). Within adult education, the educator and the learner assume various roles (Cranton, 1992). Experience is central to professional development (Cranton; Dewey, 1938; Martineau, 1998). Relationships and interactions learner and educator serve to strengthen professional development experiences (Cranton). Autonomy and learner needs must be considered when delivering professional development activities (Cranton; Martineau). Collaboration is an essential component of professional development (Elliott & Woloshyn, 1997; Martineau; Woloshyn & Elliott, 2001). The literature reviewed established a context for this case study in which I explored how four secondary school teachers used the portfolio in their classrooms.

### Present Study

The present study examined the experiences of 4 secondary school teachers who used the portfolio in their classrooms. I acted as both researcher and participant in this study. Data were collected through individual interviews, group reflective sessions, and participant portfolios. The first individual interview provided an understanding of the

teachers' perceptions of the portfolio through questioning about past experiences with the portfolio. Information gathered from this interview allowed me to develop two training sessions to help prepare participants for portfolio implementation in their classrooms. The second individual interview provided an understanding of the teachers' experiences using the portfolio including the purposes served by the portfolio, the effect of the portfolio, and their perceptions of the portfolio as an assessment and/or evaluation strategy.

The group reflective sessions provided an opportunity for participants to reflect on their experiences in a collaborative environment. In the first session, we shared our experiences introducing the portfolios to our students. This included challenges and successes, students' initial reactions to the portfolio, and our expectations for the remainder of the portfolio implementation period. In the second group reflective session, we dialogued about our experiences implementing the portfolio. We reflected on specific classroom experiences and considered the success of the portfolios in our classrooms. In addition, both our responses and our students' responses to the portfolio were considered. In the third session, we discussed the effectiveness of the portfolio in our classrooms. In this discussion, we explored how the portfolio related to students' learning, the curriculum, and teaching. In the final session, we talked about their changing perceptions of the portfolio including purposes of the portfolio and whether to assess or evaluate student portfolios.

Throughout the study, we also spent time reflecting using journaling in our participant portfolios. We included materials related to the development of the portfolio

in our individual classrooms as well as our thoughts about the planning and implementation process.

The goal of this case study was to understand the experiences of 4 secondary school teachers as they implemented the portfolio in their classrooms. As we worked through the process of preparing the portfolio for implementation in our respective classrooms, we were able to individualize the portfolio to meet our unique curriculum and student needs. Both teachers and students were able to take control over the learning process. The portfolio informed teachers about their teaching. Teachers also used the portfolio as a tool to reflect on curriculum delivery. The professional development structure of this study resulted in a collaborative environment that supported us successfully using portfolios.



## **CHAPTER THREE: METHODOLOGY AND PROCEDURES**

### **Overview**

This qualitative study provided an understanding of the experiences of 4 secondary school teachers who used the portfolio in their classrooms. This chapter focuses on describing the methodology and procedures of the study. In order to provide a clear explanation of this process, this chapter begins with a description of the research methodology. Next the participants involved in this study and then the materials are described. The procedures are outlined, followed by an explanation of how the data were analyzed. This chapter concludes with a discussion of the limitations of this study.

### **Description of Research Methodology**

The methodology chosen to gain an understanding of the experiences of 4 secondary school teachers using the portfolio in their classrooms was the case study. The case study allowed the exploration of multiple cases over a specified time period using in-depth data collection that involved varied data sources (Creswell, 1998). Specifically, this methodology was chosen because it enabled the examination of 4 individuals' perceptions of the portfolio in the secondary school classroom over a 9-week period. The case study allowed the researcher to participate actively in the study, provided a natural context for the study, and allowed the researcher to collect data using three procedures.

As the researcher, I was able to assume an interactive role with the participants (Cranton, 1992; Ertmer, 1997). Specifically, I led the participants in the implementation of the portfolio in the classroom and also used the portfolios with my own students. Because I was involved with the participants in the implementation process, I was able to

not only ask questions during interviews, but also comment on my own experiences. This allowed for a more intimate understanding of the experiences of the participants.

The case study explored a phenomenon within a natural setting or context (Ertmer, 1997). In this study, this allowed the 4 of us as participants to implement the portfolio in our own classrooms. Thus our perspective about the use of the portfolio in secondary school classrooms was within a context already familiar to us.

The case study allowed me to collect detailed information using various data collection procedures (Ertmer, 1997). For this study, individual interviews, reflective sessions, and participant portfolios provided information about the experiences of 4 secondary school teachers using the portfolio in their classrooms. The individual interviews provided personal impressions and thoughts about the portfolio. The group reflective sessions promoted co-operation and sharing surrounding our experiences with the portfolio. The participant portfolios provided an opportunity to organize and reflect on portfolio experiences.

### Participants

This study involved 4 participants. I am the first participant. The additional 3 participants involved in this study were intentionally chosen from among the staff members at my secondary school. I designed and conducted all interviews, training sessions, and reflective sessions. In addition, I actively participated in all aspects of the study.

From the staff at my school, 3 chosen participants were individually approached and asked if they wanted to participate in a study designed to understand their experiences using the portfolio. Specifically, they were provided with a written overview

of the project, its objectives, and associated time requirements (Letter of Information, Appendix A). Interested teachers immediately agreed to participate. The research participants signed a consent form (Appendix B). The participants received all interview protocol before the study began (Appendixes C, D, E). The participants agreed to the use of pseudonyms. The study took place at the secondary school where I and the 3 others participants were teachers.

The participants were teachers from across subject areas with varied years of teaching experience. It was important that the participants teach different subjects because this allowed for an understanding of the portfolio in various subject contexts. In addition, choosing teachers with different years of classroom experience provided the opportunity to understand the portfolio when used by participants with various years of teaching experience. This sampling strategy enabled diverse representation of portfolio use in the secondary classroom, allowing for multiple perspectives (Creswell, 1998).

Despite the Ontario Ministry of Education and Training (1999b) guidelines for assessment and evaluation of achievement that advocate “[promoting] students’ ability to assess their own learning and to set specific goals” (p. 10), there had been little, if any, instruction for teachers in the area of portfolio use. The participants selected for this study had not received any specific training in this assessment strategy. As a result, all participants were willing to participating in two training sessions on the use of the portfolio in the classroom.

At the time of the study, I was 28 years old and employed as an assistant history department head. I was in my sixth year as a classroom teacher and was teaching both history and French. During the 1998-1999 school year, I worked as a Special

Assignment Teacher for the curricular implementation of Secondary School Reform. In this capacity, I designed and implemented board-wide professional development days dealing with the implementation of Secondary School Reform. I was aware of the demands of the curriculum as well as the needs of the teachers.

Phyllis (pseudonym) was a 43-year-old female who had been a teacher for 16 years. She had taught science, history, math, and English. At the time of the study, she taught health and physical education and was the head of the physical education department. Her education and training include a bachelor of science, a bachelor of education, a physical education specialist, and special education part 1. Phyllis was involved as a member of an OAC physical education writing team. I chose Phyllis as a participant in this study because she is a very positive and enthusiastic presence at our school. She is very inquisitive and is a good problem solver. Phyllis has been instrumental in interpreting the new ministry expectations for her department. She is constantly trying new things in order to effectively teach the new curriculum to her students. She attends board in-service when possible and uses the knowledge gained to improve herself as a teacher. I was also particularly interested in how the portfolio works in a physical education classroom because of the nontraditional classroom environment.

Connie (pseudonym) was a 42-year-old woman who had taught for 13 years. At the time of the study, she taught co-operative education, which she had been involved with for 2 and a half years. Prior to teaching co-operative education, she was a business studies teacher, and before that she taught adult education for 6 years. Connie has a bachelor of arts and a bachelor of education degree. She also has completed co-operative education parts 1, 2, and 3 as well as guidance parts 1 and 2 and computers in the

classroom part 1. Connie was part of the writing team used to introduce a provincial training kit, “Cooperative Education and Other Forms of Experiential Learning,” to co-operative education teachers. Her continued interest in learning is what initially motivated me to include her in this study. She is always eager to learn and has been involved in developing the portfolio for her co-operative education students. I knew that she was struggling a bit with creating a portfolio structure that met the needs of her students, her program, and government requirements.

Heather (pseudonym) was a 27-year-old female who was in her fourth year of teaching. She had taught history, geography, and family studies, all at the secondary level. At the time of the study, she taught history and career studies. Her formal education and training include two bachelors of arts, one bachelor of education, history specialist, and computers in the classroom part 1. I chose Heather for this study because she is an enthusiastic and creative teacher. She is very involved at the school level in interpreting ministry documents. She is constantly reorganizing her classroom learning environment to meet the needs of the students and the curriculum requirements. In addition, she is actively involved in assisting other staff members to interpret ministry documents through attending conferences and providing school-level in-service for staff.

### Materials

The materials used for this research study consisted of a professional development program designed to model how to introduce, instruct, and sustain portfolio use in the classroom. Monitoring of this professional development program consisted of individual interviews, group training sessions, reflective sessions, and participant portfolios.

*Professional Development: Interviews*

The first component of the professional development program consisted of individual interviews with each participant (Appendix C). The first interview took place at the beginning of the study, and the second at the end of the study. I interviewed 3 participants and my supervisor interviewed me. This enabled me to assume both roles as researcher and participant (Cranton, 1992).

The purpose of the initial individual interview was to understand these secondary school teachers' perceptions of the portfolio. Participants described experiences to date with portfolios. This included answering questions about perceptions of portfolio definition and classroom use. Connie, Heather, and I were asked to elaborate our reasoning for prior portfolio use. Phyllis, who had not previously used the portfolio in her classroom, explained why.

An understanding of prior experiences with portfolios clarified the participants' perception of the portfolio and its purpose. This allowed me to understand how these perceptions affected their use of the portfolio in the secondary school classroom. I was concerned that the participants may have felt confused or overwhelmed by the concept of a portfolio. Hebert (1998) stated that when teachers initially become involved in the portfolio, they have different ideas about what goes into a portfolio. Burke et al. (1994) acknowledged that the use of portfolios in the classroom has been sporadic and that the purpose of the portfolio is evolving. I predicted that the participants might have misconceptions about what a portfolio is. Hebert recalled her initial experiences with the portfolio as a time of exploration and reflection. Looking back on her experiences, she realized that she continues to learn and to rework the portfolio concept. Understanding

what the participants believed about the portfolio was important as a starting point for the professional development activities that followed. It allowed me to understand the participants' prior knowledge. For the participants who had used the portfolio in their classrooms, it was important to understand how and why it had been utilized. This understanding allowed me to appreciate the participants' past portfolio experiences and enabled me to structure the professional development activities so that this next portfolio experience was beneficial (Cranton, 1992; Dewey, 1938; Martineau, 1998). For Phyllis, who had not used the portfolio in her classroom, I was able to ensure that the professional development activities prepared her to effectively and confidently use the portfolio in her classroom.

This initial individual interview also demonstrated what the participants assumed about assessment versus evaluation. The participants were asked to define assessment and evaluation and to provide an example of both an assessment strategy and an evaluation strategy. I anticipated that we would concentrate on evaluation because it is a process that easily measures what students know. Travis (1996) determined that educators focus on knowledge and skills and often neglect attitude and behaviour when measuring outcomes. The participants were also asked to explain whether they thought the portfolio is more powerful as an assessment strategy or as an evaluation strategy. I anticipated that this question might be difficult for us simply because of our limited experiences with portfolios.

An understanding of the participants' assumptions about assessment and evaluation was important because it clarified for me what the participants understood about the distinction between assessment and evaluation. Because these two terms have

very different meanings in terms of student learning and achievement, it was important that these concepts be adequately addressed in the professional development activities that followed. By asking the participants to specifically describe assessment and evaluation with an example, I understood how these concepts were interpreted and applied in their classrooms. Whether or not we perceived the portfolio as an assessment strategy or as an evaluation strategy clarified further what we assumed about the portfolio and its relationship to student learning.

This initial interview enabled an understanding of what the participants perceived about the portfolio. Conversation, initiated by the questions asked, enabled me to direct the professional development activities to ensure that the participants received the training needed to implement the portfolio. Martineau (1998) demonstrated that professional development should be based on what teachers need to learn.

Following the completion of the implementation of the portfolio in each participant's classroom, I sat down with each participant and with my supervisor for a final interview. The purpose of this interview was to understand the experiences of these secondary school teachers using the portfolio in their classrooms.

We described our experiences using the portfolio in our classrooms over 9 weeks, as well as the purpose we believed the portfolio served in our classrooms. We also discussed the impact that we believed the portfolio had on our students, specifically on their learning, and we shared our students' attitudes toward the portfolio. We also described how we were impacted, as teachers, by the portfolio. Finally, we were asked to discuss our perceptions of the portfolio as an assessment and evaluation strategy.



The purposes the portfolio served in our classroom enabled an understanding of how the portfolio fits into the classroom context. Was this purely an assessment strategy or did it promote learning as well? Would the portfolio better serve as an assessment or as an evaluation strategy? If the participants clearly articulate an understanding of the purpose served by the portfolio in their classrooms, the portfolio will be used effectively for that stated purpose (Midwood et al., 1994). Burke et al. (1994) stressed that teachers need to understand the purpose and type of portfolio before beginning to implement this in the classroom. An understanding of the perceived impact the portfolio has on the students allowed me to consider how students can use the portfolio. Insight into the participants' perceptions about how the portfolio affected student learning impacts the concept of the portfolio and its relationship to learning. In addition, the perceived attitude that the participants' students have towards the portfolio allowed me to understand how these students responded to the portfolio. If the students responded positively to the portfolio and were motivated by it, the effects on learning would be different than if they responded negatively and viewed it as "just another hoop to jump through." It might be possible that each student reacted differently to the portfolio. Exploring the impact that the implementation of the portfolio has on each participant was necessary in order to understand whether the portfolio is realistic within the context of a challenging professional climate. The attitude of the participants towards the portfolio after 9 weeks of use in the classroom provided me with insight into how each participant was affected by the use of the portfolio in her classroom. An understanding of the participants' perceptions of the portfolio as an assessment and evaluation strategy helped

me to understand how successful they viewed the portfolio to be when used for their identified review purpose.

*Professional Development: Group Training Sessions*

The second component of this professional development program consisted of two 2-hour after-school training sessions (Appendix D). The participants received both theoretical and practical information and were provided with the opportunity to apply this information before bringing it back to the classroom. Throughout these training sessions, I assumed the role of “theoretical expert” (Cranton, 1992).

Based on the initial individual interviews, I designed two comprehensive training sessions that modeled how to introduce, instruct, and sustain portfolio use in the classroom. This phase in the professional development program was especially important because it modeled for teachers the concept of backward design (Wiggins & McTighe, 1998). The backward design approach to curriculum delivery first identifies the curriculum expectations, second designs assessment strategies, and finally develops teaching and learning strategies. My role in this phase involved facilitating the delivery of the information and also participating in the training sessions by rethinking the portfolio structure that I wanted to introduce in my own classroom.

The first training session introduced participants to the concept of a portfolio and how to implement this assessment strategy in their classrooms. This introduction included an explanation of what a portfolio is, a description of the purpose of a portfolio, what types of portfolios exist, and what materials can be included in a portfolio.

Many definitions exist to explain what a portfolio is. Participants examined these definitions and developed a definition that suited the purpose of their portfolio. They

were shown my definition, which explained the portfolio as a thoughtful collection of materials that demonstrate learning and growth over time.

In explaining the purpose of the portfolio, curriculum expectations were considered. This was necessary because, before an assessment strategy is defined, the expectations must be defined. The participants must have a clear understanding of what students will know and be able to do through the use of the portfolio. What students will know and be able to do are the expectations. Once the expectations were established, I modeled an explanation of the portfolio as an assessment strategy that focused on student reflection and input. This was important because it clarified exactly what my students would be working towards. Next, the portfolio was demonstrated as a learning strategy. This detailed for participants how the portfolio would be used to promote learning for my students.

By understanding the purpose of the portfolio within the context of the backward design (Wiggins & McTighe, 1998) approach to curriculum design and delivery, the 3 other participants were prepared to effectively introduce the portfolio in their classrooms. By ensuring that the expectations are met through the design of an assessment/evaluation strategy supported by teaching and learning strategies directly linked to the expected performance, students have a clear understanding of what they are working towards. This, in turn, allows students to focus on their own learning.

The next section of the professional development program outlined the different types of portfolios that existed and what each type of portfolio could be used for. Specifically, electronic portfolios (Lankes, 1999; Wiedmer, 1998), academic portfolios (Burke et al., 1994), personal portfolios (Burke et al.), and professional portfolios (Burke

et al.) were explained. Through exploring different types of portfolios, we decided what type of portfolio best suited our identified purposes.

Once each participant selected a type of portfolio, the next step in this professional development program was to decide what to include in a portfolio. I provided the other participants with examples of materials that could be collected and placed in a portfolio. This included classroom assignment-based portfolios (Sweet, 1993) as well as draft, revised, and final versions of student work samples (Midwood et al., 1994). This stage of the professional development activity was important because the participants saw that there are endless possibilities for portfolio contents. By stressing the definition of the portfolio as a thoughtful collection of materials that demonstrates learning and growth over time, the participants realized that students would select samples of their own work and achievements that provided them with a voice to share their story. This enables students to take responsibility for their learning and allows the focus to be on what students can do.

The purpose of the second training session was to determine how the portfolio would be reviewed and taught. This included developing criteria for the portfolio, determining how and when the portfolio would be reviewed, and designing teaching strategies.

I involved the participants in the development of the criteria for the portfolio they structured in the first training session. This involved listing what a completed portfolio should look like. The criteria modeled included evidence of goal setting, knowledge, application, and reflection. The participants were made aware of the endless possibilities of criteria (Burke et al., 1994). From these possibilities, we determined which criteria

were a priority for our chosen portfolios. I stressed that the purpose of the portfolio as identified in the first training session must correspond with the criteria being established. This ensured that what is being assessed and/or evaluated accurately reflects the learning expectations previously established. Next the participants created a rubric for the portfolio. A rubric is used to specify the established criteria (Burke et al.). A rubric sample was provided for the participants. This rubric described what students need to demonstrate in terms of goal setting, knowledge, application, and reflection in order to be successful. The rubric can be developed with students prior to beginning the task of developing the portfolio to ensure that students know exactly what is expected of them. “Rubrics clarify expectations, provide parameters, and offer guidance both to students preparing portfolio and to teachers evaluating them” (Burch, 1997, p. 55). By taking the participants through the criteria and rubric development step by step, I encouraged the other participants to communicate with and involve their students in the development of portfolio criteria.

Once criteria were developed, the next part of the second training session involved determining how and when the portfolio would be reviewed. Participants were able to choose to use assessment and/or evaluation. My focus was on using the portfolio for assessment and not for evaluation and providing feedback through comments rather than through grades. In order to focus on learning, feedback must provide students with the opportunity to learn and grow through each learning experience. Kohn (1999) demonstrated that if students know that their performance will be graded, they lose interest in learning. If students are afraid of losing marks through a demonstration of what they have learned, then they will stop taking risks with the portfolio. Students who

know they will be graded on a performance concentrate on getting a good mark by doing a less challenging task (Kohn). Students who are trying out something new are engaged in risk taking. Canady and Hotchkiss (1989) recognized that this risk taking is often left unrecognized in schools. They advocated for recognition of risk taking by giving encouragement instead of low marks. Students who are allowed to make choices are able to learn more about themselves, what they already know, and what they can do to improve their learning (Fogarty, 1999).

The last portion of this second training session involved the development of teaching strategies. I led the 3 other participants through a review of the process involved in the training sessions to date. They were reminded that the first session, with the establishment of the definition, purpose, type, and materials, was in fact step one in the backward design process (Wiggins & McTighe, 1998), where expectations are outlined. The development of the criteria and the determination of how and when the portfolio would be reviewed, covered in this second training session, were in fact step two in the design down process (Wiggins & McTighe), where the assessment/evaluation task is established. The third step in the design down process involved translating the expectations and the assessment/evaluation task into the classroom experience (Wiggins & McTighe). I challenged myself and the 3 other participants to apply what we had learned to date so that we could effectively implement the portfolio as an assessment and learning strategy in our classrooms. This involved taking the time to review the professional development process and to plan for the implementation of the portfolio in our classrooms.

*Professional Development: Group Reflective Sessions*

The third component of the professional development program involved biweekly, one-hour, after-school group reflective sessions (Appendix E). These four sessions provided an opportunity for participants to share portfolio implementation experiences with each other within a collaborative environment (Elliott & Woloshyn, 1997; Woloshyn & Elliott, 2001). The dialogue allowed us to ask questions and to share advice based on our personal experiences. This phase, for me, required that I assume the roles of both colearner and researcher (Cranton, 1992). I prepared the reflective session protocol and I participated actively by sharing my experiences implementing the portfolio in my own classroom.

The first group reflective session took place at the end of week 1 of portfolio implementation. The purpose of this session was to understand our experiences introducing the portfolio to students. We described what it was like to introduce and explain the portfolio to our students, and we talked about factors that facilitated or impaired the introduction and explanation of the portfolio. We also described our students' initial reactions to the portfolio and identified factors that we believed impacted on our students' reactions.

An understanding of the experiences introducing the portfolio was important because it allowed me to gain insight into whether or not the training sessions provided prepared us to effectively introduce the portfolio to our students. An understanding of the factors that facilitated and impaired the introduction and explanation of the portfolio served to isolate factors that need to be considered when initiating portfolio use in the classroom. How students initially reacted to the portfolio was important because, if

students are discouraged from the beginning, this may affect how the portfolio impacts on their learning. On the other hand, if students are positive from the onset, the portfolio may act as a motivator that encourages their learning. An understanding of factors that may have affected students' reactions helped to identify what might be changed or what might be repeated in the introduction of portfolios in secondary school classrooms.

This first group reflective session also allowed us to describe what we would be doing over the next 8 weeks to make the portfolio work in our classrooms. We described any specific strategies we thought we might use, and we anticipated the ease or difficulty of this task. We also described what we expected from our students over the remaining 8 weeks of portfolio use in our classrooms. We talked about how we communicated our expectations to our students and how we would continue to communicate these expectations to our students. As well, Connie shared sample portfolios.

By understanding how we anticipated making the portfolio work in our classrooms, insight was gained into effective teaching and learning strategies with respect to portfolios in the classroom. It was useful to know whether or not we believed this implementation task would be easy or difficult, because it allowed me to gauge confidence level. Through the descriptions of what we expected from students, an understanding of what criteria had been established for the portfolios was gained. It was evident how much the students were involved in the development of the criteria when we detailed how we had communicated expectations to our students. We also demonstrated whether or not we were using the portfolio as an assessment strategy or as an evaluation strategy when we explained how we planned to communicate our continued expectations. The Ontario Ministry of Education and Training (1999b) described what this



communication means in terms of assessment and evaluation. If teachers are providing anecdotal comments with a focus on improving student learning, they are utilizing the portfolio as an assessment strategy. If they are assigning a grade, they are utilizing the portfolio as an evaluation strategy.

The second group reflective session took place at the end of week 3 of portfolio implementation. The purpose of this group reflective session was to understand our experiences implementing the portfolio in our classrooms.

We described our experiences implementing the portfolio into our classrooms. In particular, we described specific situations that we encountered and explained how we handled these situations. We also explained how these situations impacted us and our students. There was some sharing of student portfolio work. This line of discussion highlighted specific situations experienced while implementing the portfolio in the classroom. How these situations impacted on us and our students demonstrated whether or not the portfolio promoted learning.

Following this, we described how the portfolio had been working in our classrooms, including a description of the purpose the portfolio served in our classrooms and how the portfolio was used. The verbal descriptions of the portfolio allowed an understanding of the role the portfolio played in each classroom. The purpose served by the portfolio further demonstrated this role.

Finally, we described the response the portfolio received from us and our students. This response articulated how we and our students viewed the portfolio and was critical to understanding how the portfolio was perceived by us and our students.

The third group reflective session took place at the end of the fifth week of portfolio implementation. The purpose of this reflective session was to understand our perceptions of the effectiveness of the portfolio.

We described our experiences implementing the portfolio into our classrooms. Specifically, we described how we supported our students' creation of their portfolios. We discussed how we were impacted by the implementation of the portfolio in our classrooms. The focus of the implementation experience during this reflective session was on the teacher experiences, because the role of the teacher in relation to the portfolio clarified the role that the portfolio fulfilled and the purpose it served.

We talked about our perceptions of any effects the portfolio had on our students. We described these effects and discussed our students' reactions to the portfolio. These questions were explored because it was important to understand how we perceived the impact of the portfolio on our students. This perception was assessed according to how we described our students' reactions in order to determine if the participants' perceptions were consistent with the students' reactions.

This third group reflective session concluded with descriptions of how the portfolio was working in our classrooms. This included sharing some samples of student portfolios. In addition, we explained any changes we might initiate in our classrooms over the next couple of weeks. The samples of student portfolios provided insight into how the students had interpreted and applied this strategy. We discussed any anticipated changes for the remaining 4 weeks of implementation. This demonstrated what we believed needed to be improved. This in turn reiterated what we believed the focus of the portfolio to be.

The fourth group reflective session took place at the end of the seventh week of portfolio implementation. The purpose of this group reflective session was to understand our perceptions of the portfolio.

We described, based on our experiences implementing the portfolio in our classrooms, what purposes we believed the portfolio served. Specifically, we described how the portfolio had measured our students' achievement, how the portfolio had impacted on our students' reflections, and how the portfolio had affected our students' learning skills. These details provided insight into the purpose served by the portfolio in each of these classrooms and clarified whether or not the portfolio positively impacted student learning and achievement.

We also described our impressions about the method we used to provide feedback to our students. First of all, we described how we provided feedback to our students, then how our students responded to this feedback, and finally the effects that this feedback had on our students. These insights helped to focus on whether or not the portfolio was effective as an assessment strategy or as an evaluation strategy. Understanding how students responded to the feedback was important because it demonstrated how various forms of feedback affected them.

#### *Professional Development: Participant Portfolios*

We each developed a participant portfolio. These portfolios reflected our implementation experiences. We prepared our portfolios on our own time. These portfolios included materials we used to develop our classroom portfolios as well as our reflections on the whole process.

These participant portfolios provided us with the opportunity to organize ideas as they related to the implementation of the portfolio in our classrooms. This included recording personal goals, gathering materials used, and reflecting on the implementation process. The process involved in creating our participant portfolios was important because it allowed us to experience this strategy as we guided our students through a similar experience. The goals that we set for ourselves demonstrated what we chose to focus on in terms of portfolio use. How we achieved these goals was reflected in the materials we included. These items demonstrated how we taught students to use the portfolio and for what purpose. Our reflections described our personal experiences with the portfolio. This provided insight into the challenges and celebrations experienced when implementing the portfolio.

#### Procedures

The research study explored the experiences of 4 secondary school teachers using the portfolio in their classrooms. An understanding of teachers' experiences provided insight about how the portfolio could be used in the secondary school classroom. Four participants were involved in this case study. This case study involved four stages including interviews, training sessions, group reflective sessions, and journaling through participant portfolios. As the researcher, I assumed a dual role as both expert and colearner (Cranton, 1992). As such, I conducted the interviews, training sessions, and group reflective sessions and provided instruction for journaling. I also participated in the study by implementing the portfolio in my classroom and participating in all stages of the study (Ertmer, 1997).

In the first stage, the participants were separately interviewed by me as the researcher, and I was interviewed by my supervisor (Appendix C). I prepared the interview protocol for each of the interviews, including my own. This initial one-hour, after-school interview clarified the perceptions of secondary school teachers about the portfolio. As participants, we were asked to share our thoughts about portfolios and their use. We were also asked to describe our assumptions about assessment versus evaluation.

In the second stage, we took part in training administered and prepared by me to instruct in the purpose, the design, and the use of the portfolio in the secondary school classroom (Appendix D). This training occurred over the course of two 2-hour, after-school group sessions. During these two sessions, I modeled how to introduce, instruct, and sustain portfolio use in the classroom. The training sessions provided me with the opportunity to observe the participants' reactions to this professional development program. These observations helped to evaluate the effectiveness of the teaching and learning strategies used in the instruction of the portfolio. Because as participants we were expected to model this delivery in our classrooms, the reactions were important in understanding whether or not this method of introduction and instruction was effective.

The third stage involved participants using the portfolio in our classrooms over 9 weeks. I also initiated portfolio use in my classroom. During this 9-week interval, we attended biweekly, one-hour, after-school group reflective sessions (4 in total: Session 1, end of week 1; Session 2, end of week 3; Session 3, end of week 5; Session 4, end of week 7) where we shared our classroom experiences with each other (Appendix E). I prepared and initiated the open-ended questions for these sessions as well as participated

through sharing my own experiences with portfolio implementation in my classroom. We also kept a portfolio of this experience. I requested that all participants create a portfolio that included goals, samples of work, and reflections.

The fourth stage occurred at the end of the 9 weeks of portfolio implementation. At this time, each participant was interviewed individually (Appendix C). Again, I prepared the interview protocol and conducted three of the interviews, and my supervisor conducted the interview for me as participant. The purpose of this final, one-hour, after-school interview was to understand the experiences of a secondary school teacher using the portfolio as an assessment strategy.

All interviews and group sessions were audio taped and transcribed. I recorded observations and impressions while conducting the interviews and while participating in the group reflective sessions. In order to facilitate the recording of observations, I designed an observational protocol (Creswell, 1998) that included descriptive and reflective observations. The participant portfolios were collected and interpreted by me. The participants were provided with an opportunity to review all transcripts as well as all interpretations and conclusions based on the transcripts, field notes, and participant portfolios. This allowed the participants to comment on any inconsistencies based on their experiences.

### Data Analysis

Data for analysis were collected from the interviews, the group training sessions, the group reflective sessions, and the participant portfolios, including transcripts, field notes, and documents. I collected data from these varied sources because I wanted to gain an in-depth understanding of the case, as suggested by Creswell (1998). My goal

was to observe and study the participants in natural settings (Gable & Rogers, 1987). All data were organized and coded in preparation for formal analysis. The formal analysis followed the procedure suggested by McMillan and Schumacher (1997). This analysis began by collecting the facts as recorded in the interviews, in the reflective sessions, and through the personal portfolios. Creswell (1998) refers to this detailed view of the facts as “description.” These facts were then reconstructed in order to gain a holistic view of how each piece of data related to the others (McMillan and Schumacher). I then examined the data inquiringly in order to highlight emerging themes and interpretations (McMillan and Schumacher).

I began the data analysis by collecting all data. The interviews and reflective sessions were audio taped and transcribed. Field notes were reviewed and rewritten for clarity. The participant portfolios were collected and used to confirm the experiences as described by each participant.

I structurally analyzed (Ertmer, 1997) the collected data in order to gain a holistic view. At this stage, I focused on how each piece of data impacted the others. Similarities and differences were noted. Also, at this point, any relationships that seem to exist between data sources were identified. I looked for patterns (Creswell, 1998) that indicated correspondence within the data collected.

Next, the data were interpretationally analyzed (Ertmer, 1997) in order to understand what the identified relationships meant. Once the structure of the data was understood, I then used the identified patterns to identify common themes that described and explained the data. This was accomplished by categorizing information contained in the data. I then critically examined the data several times before determining how to

categorize the information. I also employed reflective analysis, as described by Ertmer (1997). I employed both judgment and intuition to categorize the information. This categorization was reflected through identified themes. Because a qualitative study develops in relationship to the participants and the experiences they share, the themes were developed as the study unfolded. The data collected were interpreted and organized consistent with the identified themes. It was necessary to identify subthemes in order to clarify separate issues within some themes. Each theme and subtheme was colour coded. I then applied these colour codes to the collected data. Once the data were colour coded, I organized the data according to the themes and subthemes. Next I examined each theme and subtheme in order to provide interpretation of the collected information.

Participants were asked at this point to examine the transcripts, including the coding of the data as well as the recorded interpretations, in order to provide comment as to whether or not they agreed with the analysis (Feedback Letter, Appendix F). I wanted to ensure that what was interpreted was consistent with the participants' reality.

The analysis of the data considered certain assumptions. I knew the 3 other participants both personally and professionally. These participants were intentionally chosen because I recognized that they were dedicated teachers who had the skills required to introduce a new concept to students in a way that motivated them to succeed.

I was aware of the political climate that existed in this school. With the many changes mandated by the provincial government through secondary school reform, we participants had been frustrated and confused by the new demands being placed on us. In addition, we were now expected to teach more with less preparation time. We had all



experienced high levels of stress and anxiety over the new curriculum and the extra workload that had been imposed on us.

This experience was not expected to unfold without some level of frustration. The reflective sessions provided an outlet for discussion and sharing. I had used the portfolio on three other occasions. In each of these situations, I learned from experience and reworked the portfolio structure, continuously endeavoring to create an effective assessment and learning strategy in the classroom. The 3 other participants had not had this opportunity. I assumed that the participants would use this experience as part of the development of a portfolio that would work for them.

When I initially thought about this study, I believed that the portfolio was an effective assessment strategy that promotes learning. As a result, I initiated this study thinking that I would explore the use of the portfolio as an assessment strategy. In order to begin the study, I designed interview protocol that included open-ended questions (Creswell, 1998). I analyzed data as I collected them in order to help me determine the most effective way to proceed for future data collection procedures (Ertmer, 1997). After the initial individual interviews, my analysis revealed that the participants wanted to mold the portfolio to suit themselves and their students. I used this information to design two training sessions that served to prepare participants for implementation of the portfolio in their classrooms. I also was able to rework the interview and group reflective sessions protocol in order to better reflect that the portfolios would be used not only to assess but also to evaluate student achievement. In addition, I decided to change the title of the study to better reflect the experiences during the study. The study was no longer

“understanding the portfolio as an assessment strategy;” it was instead “understanding the portfolio in the secondary school classroom”.

In order to communicate the findings of the data analysis, I chose to write narratives that provided details about each participant experience (each participant agreed to a pseudonym). This medium served to consolidate the whole study (Creswell, 1998) and to “reconstruct the participants’ reality” (Ertmer, 1997). The narratives were organized according to the identified themes (Creswell) that emerged when the data sources were analyzed. This allowed me to provide the perspective of each of the 4 participants. Because of the unique role I played as expert, colearner, and researcher (Cranton, 1992), the narrative format allowed me to speak personally and in a familiar fashion (Creswell).

#### Limitations

Certain limitations exist when qualitative research is used to study a phenomenon. These limitations include the inability to generalize the results (McMillan & Schumacher, 1997). A qualitative study provides insight into a specific situation. In this case study, the situation involved 4 participants. We were secondary school teachers striving to cope with a new curriculum that had placed the focus of learning on assessment and evaluation. We were using the portfolio in our classrooms. The results of this study were not necessarily applicable to every secondary school teacher. Instead, this study provided an outlook on how 4 individuals used the portfolio in their classrooms.

This case study involved 4 participants who knew each another personally and professionally. As a result, we worked well together and had an understanding of how each operated. This condition was unique because it allowed for a professional

development opportunity that focused on guiding and sharing. Because we all cared about one another, the environment was a respectful one that promoted individual expression. We were not intimidated by the climate of the professional development activity, and we freely expressed our thoughts and concerns.

The fact that we all taught in the same school also served as a limitation because we were teaching in the same culture. As a result, our experiences with the portfolio were influenced by the same-school environment. This limited understanding the portfolio used under varied circumstance.

Another limitation concerned the reflections and dialogue of the participants. The expression of experiences may be inconsistent with actual classroom practice. Because I did not conduct an observational check, it was impossible to verify this. As a result, what the participants said may not reflect what they did.

This case study took place over a period of 13 weeks. This process involved two individual interviews, two group training sessions, and four group reflective sessions. There were 4 participants, including me, the researcher. This case study allowed for an understanding of how 4 participants used the portfolio in their classrooms. The process of implementing the portfolio involves much trial and error on the part of both the participants and their students. This case study provided information indicative of what these participants experienced when using the portfolio in their classrooms.

### Chapter Summary

This chapter outlined the methodology and procedures involved in this qualitative study designed to understand the experiences of 4 secondary school teachers using the portfolio in their classrooms. The description of research methodology, participants,

materials, procedures, data analysis, and limitations were explained in order to provide an understanding of how the case study was employed to explore the portfolio used by 4 secondary school classroom teachers.

## **CHAPTER FOUR: ANALYSIS OF DATA**

### **Overview**

The audio-taped interviews and group reflective sessions were transcribed verbatim. These transcriptions, the participant portfolios, and the field notes were analyzed to gain a holistic view of the experiences of 4 secondary school teachers who used the portfolio in their classrooms. Specifically, the analysis focused on exploring differences, similarities, and connections between the sources of data. Next, these identified relationships were analyzed to gain understanding of the teacher experiences. Based on this, information was categorized according to emergent themes that best described and explained participants' experiences using the portfolios.

The themes that emerged from the data included teacher attitude, portfolio structure, portfolio purpose, challenges, effect, and professional development. Teacher attitude provides details about motivation for portfolio use and general reactions to the portfolio concept. The portfolio structure overviews the format of the participants' portfolio designs. The portfolio purpose details how the participants used the portfolios in their classrooms. The challenges demonstrate some of the struggles experienced by the participants. Portfolio effect is widespread for students and teachers as well as the curriculum and the classroom environment. Professional development is discussed in terms of the support offered to participants. Narratives were developed to explore the themes as they related to each participant experience. Each narrative begins with a profile that summarizes each participant's previous portfolio experience. Following this, each theme is introduced in order to outline the

structure of the presentation of findings. The presentation of findings is supported by purposefully selected quotes from the transcripts, field notes, participant portfolios, and appendixes gathered from the participants' portfolios that serve to accurately represent the reality of each participant.

## Narratives

### *Phyllis*

*Profile.* Prior to implementing the portfolio in her classroom, Phyllis's assessment and evaluation practices involved concrete evidence of performance as opposed to relying on subjective impressions of student performance. She stated, "you need some concrete analysis—you can't just go on subjective which physical education could become" (Individual Interview #1, February 14, 2001). In order to evaluate skills, Phyllis had skills' days. Students were evaluated based on skill performance that was practiced prior to the skills' days. Phyllis made use of a checklist in order to record student performance on scale of 1 to 10. She began using rubrics to aid her in this process, but she found them "cumbersome" (Individual Interview #1, February 14, 2001) and difficult to judge performance using levels 1 through 4, as is mandated in the new curriculum.

Phyllis also used skills tests to evaluate student progress. Her students wrote skills tests and then exchanged the papers so that they could mark each other's work. This process enabled Phyllis's students to "learn right from wrong" (Individual Interview #1, February 14, 2001). She had her students sign the test that they corrected for "honesty" (Individual Interview #1, February 14, 2001). Phyllis used the skills tests to involve students in the evaluation process by giving them some

responsibility. When evaluating through performance or through skills tests, Phyllis always provided students with their mark immediately.

Phyllis's previous marking practices were "ongoing because sometimes the student could have a bad day on the day you're marking" (Individual Interview #1, February 14, 2001). Phyllis provided her students with the opportunity to be successful. She was aware that some of her students got nervous when they knew they were being marked. Phyllis described her assessment practices as a lot of "watching" (Individual Interview #1, February 14, 2001). She provided students with immediate feedback concerning what she observed as she circulated through the gym. She stressed the fact that she wanted to be aware of the improvements that her students were making and that she wants to reinforce those improvements. In addition, because she "watched" students constantly, her students would not worry so much if they messed up on an evaluation. They were assured that there would be other opportunities to demonstrate successful performance.

Phyllis's assessment and evaluation practices focused on providing varied opportunities for students to demonstrate achievement of skills. She provided both assessment and evaluation opportunities through observation and written tests. She used rubrics, checklists, and scales to record student progress. Observation enabled her to provide immediate, positive feedback to students. She struggled with keeping track of student performance in order to effectively recognize improvements.

This study represented Phyllis's first experience using the portfolio in a classroom. Her previous encounters with the portfolio were as an observer. I observed during our first individual interview (Field Notes, Individual Interview,

February 14, 2001) that this left her with a negative impression because she viewed the portfolio as something that detracted from the class. Despite this negative experience, she was excited about using the portfolio with her own classes, and I believed that Phyllis used this experience to motivate her to do something different with the portfolio in her classes (Field Notes, Individual Interview #1, February 14, 2001).

*Teacher attitude.* Phyllis's attitude concerning the portfolio was demonstrated when she discussed the reasons why she wanted to introduce a portfolio system to her students. Phyllis was motivated to implement the portfolio in her classroom because of the new assessment and evaluation requirements mandated by the government. She was working with a 10th-grade girls' physical education class and was required to introduce a 30% final evaluation. Phyllis viewed the portfolio as an evaluation strategy that fulfilled this new requirement.

Phyllis demonstrated a positive attitude as she contemplated the implementation of the portfolio in her grade 10 classroom. She was inspired by her previous observation of a portfolio system that did not complement the physical education program. Despite her limited experience, Phyllis was prepared to try the portfolio as an evaluation strategy, and, because this was her first experience, she was open to an emergent portfolio format. She was motivated by this new experience because it "[made her] go through [her] stuff and think about it on a different level" (Individual Interview #1, February 14, 2001). Throughout this first individual interview, she was very positive about her students and felt confident that they would "buy into it" because they were "very achievement oriented." She was excited about



providing a positive experience for her students.

When Phyllis talked about her experience introducing the portfolio to her students, she emphasized her happiness and how much “fun” she was having. She was very positive about her students’ responses to the portfolio. Phyllis believed that the portfolio was proving to be effective. She was very enthusiastic about how the portfolio experience was “playing out” with her students and was particularly proud of an assignment included in the portfolio and brought samples to share with the other group members. When Phyllis discussed her perception of the portfolio, she reiterated the fact that it was a fun process and that she had enjoyed doing it. She believed that she had successfully accomplished what she set out to do. Phyllis planned to continue using the portfolio the following year and discussed some of the ideas that she had in mind in terms of using the portfolio in other physical education classes.

When the study concluded, Phyllis had not yet completed the final conference with her students. She was looking forward to the final evaluation component of her portfolio system.

*Portfolio structure.* The characteristics of Phyllis’s portfolio were developed throughout the study. As a result, Phyllis’s portfolio structure could be described as emergent.

Phyllis’s criteria for her portfolio system included organization, neatness, and completeness. She explained that it was necessary to share the criteria with her students so that they would not be “lost” (Individual Interview #1, February 14, 2001). Phyllis was most comfortable articulating the criteria to her students through

dialogue as opposed to a written rubric, which she viewed as less effective.

Phyllis required that each student portfolio contain all written course work (Appendix G). This included samples of weight training information, nutrition/health information (body image project, dietary analysis, role model), fitness information (test and retest and evidence of achievement, pictures that represented their understanding of fitness, and health and life-style goals), and sexual education information (case study). Written tests with answers and reflections that mirrored the academic sections included above were also required to be incorporated in the portfolio. Phyllis also provided an opportunity for students to choose samples that related to any of the areas of study; this could include pictures that reflected critical concepts.

Phyllis designed the review component her portfolio system as a tool to evaluate final student achievement. All material housed in student portfolios was reviewed once before being included in the portfolio. This initial review process was ongoing and involved the use of checklists and rubrics. The checklists allowed students the opportunity to finish any work they were missing in preparation for the final evaluation. The rubrics enabled Phyllis to provide her students with feedback. Other materials, such as tests, were evaluated by Phyllis before they were placed in the portfolios. The final review process involved a student-teacher conference. Achievement on this component was evaluated.

*Portfolio purposes.* Phyllis's identified portfolio purposes included tracking, evaluation, reflection, learning, skill development, academic, and assessment. The major purpose was evaluation. All other purposes related to helping students prepare

for their final evaluation, to which the portfolio was central.

Phyllis initially discussed using her portfolio system as a way of tracking student progress, especially in the area of fitness. A system of tracking was something familiar to Phyllis “because we always did fitness testing and the kids always kept a record” (Individual Interview #1, February 14, 2001). Phyllis used the portfolio system to record fitness-testing results.

From the beginning of the study, Phyllis also expressed her intent to use the portfolio to fulfill the 30% final evaluation curriculum component. I observed during our first individual interview (Field Notes, February 14, 2001) that she was concerned about this new requirement in the physical education curriculum and developed the portfolio so that students had something concrete to help them prepare for their oral final exam. Phyllis expressed concern that her students were expected to be tested on information in June that they might not have revisited since February. She viewed the portfolio as a “collection of their stuff” (Group Reflective Session #1, March 27, 2001) that could be reviewed in preparation for the final conference. She planned to provide her students with a list of individualized questions one week ahead of time, based on the information included in their portfolios.

Phyllis believed that receiving a mark for their portfolio had a positive impact on how her students approached the portfolio. The evaluation motivated her students and added credibility to the activity. She was afraid that without a mark connected to the portfolio, her students would not have taken the portfolio seriously “and it would [have] become a piece of fluff and they wouldn’t—well, it just wouldn’t [have been] well done” (Individual Interview #1, February 14, 2001). She also reminded her

students that they would not do well on their final evaluation if they did not complete the portfolio. This provided them with an incentive to complete the portfolio. In addition, the final evaluation enabled her to measure her students' final achievement.

From the beginning of this project, Phyllis also expressed that she wanted her students to reflect on material contained in the portfolio. Phyllis designed portfolio tasks that required students to write reflective comments about positive and negative body images and how they were affected by these images. In June, she wanted students to look back at comments they had made earlier in the course to determine if their opinions had changed at all. Phyllis also provided students with the opportunity to reflect on fitness goals and to explain whether or not they had met these goals. She challenged them to choose a role model and to defend their choice through reflection. Phyllis also required students to bring in samples that represented their thoughts about fitness. Phyllis's portfolio system also provided students with the chance to reflect on "big issues" such as abuse and abusive relationships. There were some issues that Phyllis was uncomfortable asking students to reflect on. An issue such as birth control was a part of the curriculum, but Phyllis did not want her students to address this issue in a personal context. Instead, she introduced alternative topics that provided her students with the opportunity to reflect without getting too personal. One such solution was to ask students to reflect on who would be affected by the choices a pregnant teen has to make. Reflections enabled students to apply the concepts taught to their own lives.

Learning and skill development were two other identified purposes for Phyllis's portfolio system. The portfolio provided students with the opportunity "to

learn how to do their cardiovascular recording and write down their heart rate post-run and all this type of thing” (Individual Interview #1, February 14, 2001). She wanted her students to see an improvement in their fitness through the portfolio. The portfolio was an outlet for her students to “talk about where they’re going, what they get, and what they’ve learned about fitness” (Group Reflective Session #1, March 27, 2001). The portfolio was an opportunity to foster the development of students’ thinking skills through challenges to discover the “big picture” as opposed to focusing on the regurgitation of facts. Phyllis designed her portfolio system to encourage her students to apply their knowledge in their lives outside of school. In fact, Phyllis stated that she believed that her students had internalized the idea that health, nutrition, and fitness are important in order to live life well and that they had used the portfolio to apply this to their own lives.

Phyllis used the portfolio system with her class to do some “academic type stuff” (Group Reflective Session #1, March 27, 2001). The portfolio allowed students to complete this work without needing to be in a traditional classroom setting. I wondered, during our first individual interview together (Field Notes, February 14, 2001), how Phyllis would use the portfolio to enrich student learning within an activity-driven subject. It was not necessary to provide a classroom setting complete with desks and chairs to meet the academic expectations outlined in the Ontario Curriculum. Students were able to assemble their portfolios and write reflections in the gymnasium during physical education class. All tests, assignments, and written work were included in the portfolio.

Phyllis used her portfolio system to assess her students. Her students handed

in their portfolios for assessment and then took the time to make improvements and to complete tasks necessary. In addition, some of the tasks included in the portfolio, for example the body image pictures, were assessed using a rubric. Phyllis believed that assessment provided her students with an opportunity to state their opinions without the fear of being “wrong.”

*Challenges.* Phyllis identified various challenges that she faced when preparing for and implementing the portfolio in her classroom. These challenges included materials, students, curriculum, time, and classroom.

In preparing to implement the portfolio, Phyllis was concerned about the cost of photocopying materials for each student. She wanted them to have meaningful samples of academic work, for example tests, instead of “scraps of paper” (Individual Interview #1, February 14, 2001). Phyllis wanted to have an organized portfolio system that could be easily stored in her small office area and transported to the gym when needed. To accomplish this, she ordered a hanging file box and gathered together file folders and name tags for students to use.

Phyllis (Group Reflective Session #3, April 24, 2001) also expressed a concern that some students might have access to resources that would enable them to create a unique portfolio and others might not have the same access.

[If] a student doesn't have these resources at home because they are coming from a family that doesn't have a computer with the nifty program that has the little graphics on it or that sort of thing, if their portfolios won't look as good, as spiffy, as other people's, and if they'll feel badly about themselves because they—you know, they may give up ultimately their effort because they don't

feel that they can do the fun, colourful things and all that sort of stuff. I just worry about that.

Phyllis believed that this lack of access to resources would adversely affect students' overall portfolio experience.

Phyllis was also concerned about student motivation as she planned to use the portfolio in her classroom. Phyllis (Individual Interview #1, February 14, 2001) thought that the portfolio might require a lot of writing and that her students would not be focused on this kind of activity in a physical education class.

So far, like, they want to come down and be physical and play games and get into their sport—you know, get into using the activity equipment or whatever we're doing at the time, and I don't think they are focused on doing writing activities.

Phyllis was concerned that this experience might be meaningless for them because of their expectations and their attitude. She anticipated that her students were prepared to be active physically, not academically. I sensed during our first individual interview that Phyllis was "concerned that she might repeat the portfolio experience she observed" (Field Notes, February 14, 2001). The challenge for her was to get her students to "buy into it somehow" (Individual Interview #1, February 14, 2001).

During Phyllis's initial individual interview (Individual Interview #1, February 14, 2001), she described her students as a "really, really good group of grade 10s." She expressed that we might not get an honest view for this study because "these kids will buy into it because they are very achievement oriented from what I've seen so far with them." She also stated that she believed that her students

would be honest with her about their experience with the portfolio. Phyllis continued to describe her students as “a really nice class” (Group Reflective Session #3, April 24, 2001). She described them as “energetic” (Group Reflective Session #3, April 24, 2001), “active” (Individual Interview #2, May 24, 2001), “homogeneous” (Group Reflective Session #1, March 27, 2001 and Group Reflective Session #3, April 24, 2001), and “on track” (Group Reflective Session #3, April 24, 2001), with involved parents. She stated that they were almost an “elite group of kids” (Group Reflective Session #3, April 24, 2001). Phyllis believed that her portfolio experience would be different with a different group of kids. Specifically, Phyllis described less responsible students as attracted to a physical education class. This type of student, she remarked, may not be able to keep track of their stuff and may not be responsible enough to bring the materials to class when they are needed. Phyllis was concerned about how student responsibility might affect the portfolio system. She has struggled with student responsibility throughout her years as a physical education teacher. She articulated this during our initial individual interview (February 14, 2001).

I mean, we are lucky with a lot of kids to get the uniform and socks and running shoes. To add to it is kind of scary. Now you're responsible for more stuff. Sometimes it is a big hurdle just to get them changed on a regular basis.

Phyllis expressed that response to the portfolio was dependent on type of student. She stated that a student who is not “paper oriented” (Group Reflective Session #1, March 27, 2001) would not do well with the portfolio.

After having introduced the portfolio concept to her students, Phyllis remarked that they had done portfolios before “[so] there was no look of inquiry or



they weren't confused or anything. And they understood exactly what I was talking about" (Group Reflective Session #1, March 27, 2001). The students were very receptive, and it was not necessary to spend a lot of time explaining the concept to her students.

When Phyllis reflected on the portfolio in her classroom (Group Reflective Session #4, May 8, 2001), she noted that her students were "selfish" and that they had an "ego problem." She stated that "they are very good at listing off what creates good self-esteem, what brings down other people's self-esteem, and then we turn around and go back into the gym and they're doing those things to one another." She discovered that they were not able to "extend beyond." She remarked that it might have been their age, but stated that she found "that the girls are far more egocentric and selfish than they have been in the past years."

Phyllis was very aware of the curriculum requirements for her subject area. She described the new curriculum as "paper oriented" (Group Reflective Session #1, March 27, 2001). She explained that the curriculum for grades 9 and 10 physical education seemed to be quite similar and academic. She struggled with the fact that the stringent curriculum demanded a lot of time. She discussed "trying to come up with ideas of different ways to have nonpaper types of ways of evaluating" (Group Reflective Session #1, March 27, 2001). This was challenging for Phyllis. In addition, Phyllis described the curriculum for junior classes as set up in such a way that students may not always "see an improvement in strength, flexibility, and cardiovascular through a physical education class unless it's a fitness class" (Individual Interview #2, May 24, 2001).

When first confronted with the portfolio as a required component for physical education, Phyllis was concerned (Individual Interview #1, February 14, 2001) that the “book work” and “written work” would “[take] away from the students’ activity time.” She also pointed out that the new curriculum required 30% of the mark devoted to health and 30% to a final exam. In addition, because Phyllis taught her students during first period, she also had to complete Teacher Advisor Group activities approximately once every 6 weeks. All of these variables took away from the activity time. She was willing, though, to work with the portfolio to minimize the amount of time taken away from activity.

Phyllis’s concern regarding time continued to emerge as a challenge. As previously mentioned (Individual Interview #1, February 14, 2001), the portfolio did take away from “activity time.” During our initial individual interview, I wondered how Phyllis would deal with the time challenge (Field Notes, February 14, 2001). Phyllis described this as “time management.”

By the time they retrieve their writing utensil, and sit down and find a spot, and do their writing and recording, and then return it—you know you’re going to burn 15 minutes. You’ve got 30 things to hand out and 30 things to collect—so yeah, it is going to take time out of the course because then you have to do your warm-up—the appropriate warm-up for the activity—so by the time you get around to your activity time—it will diminish the activity time. In order to deal with the time challenge, Phyllis used part of the health class time to work on the portfolio. In fact, all portfolio work was completed during class time. Phyllis noted (Group Reflective Session #3, April 24, 2001) that her students were

not as receptive to working on the portfolio during “gym time.” They just wanted “to play” when they were in the gym. Phyllis felt like she had to “scam” her students in order to use some of their gym time to complete portfolio activities. The students complained that the portfolio took “a little bit away from their fitness activity” (Individual Interview #2, May 24, 2001).

Phyllis was challenged by the length of time conferencing would take. Based on past experiences with her weight training class, she found that she often did not accomplish what she had planned to in a class because the conferences seemed to drag out and take longer than expected. She anticipated that this was something that she would have to move through and that her evaluation of them would also have to be done “very quickly.” Her plan for conferencing was to block off a week and conference with four students a day. She believed that she could allow only for 15 minutes per student.

Phyllis did not teach in a traditional classroom setting. This was a challenge for her because of the safety issue when, for example, she was conferencing with other students. She expressed this challenge during the first group reflective session (March 27, 2001). “[In] gym it’s tough. They’ve got equipment, and there are things going that you have to be watching.” However, she admitted that this group of students “can be quite safe and trustworthy when I’m not 100% watching them,” but this was a concern that Phyllis raised. She stated that this would not always work because with certain groups of students you would have to find an alternative to a physical activity because not all students could be trusted to participate physically without supervision.

A second challenge regarding the classroom was that there was no classroom available for Phyllis to use, even for health class.

[We] don't have those opportunities to sit down in a classroom at a table to do some writing or to do something where they have to have pens and paper out because we don't have the facilities and can't always get them on one specific day. (Group Reflective Session #1, March 27, 2001)

Despite the academic requirements of the new curriculum, Phyllis's students were in a traditional classroom only a limited amount of time.

*Effect.* Implementation of the portfolio in Phyllis's classroom affected her students, herself, and the curriculum. Phyllis described effect on her students in terms of control, risk-taking, anxiety, individual representation, focused on success, attitude, interaction, and learning. Effect experienced by Phyllis included control, anxiety, rapport with students, and information about teaching. Effect on the curriculum was both positive and negative.

*Students.* When planning for the implementation of her portfolio system, Phyllis anticipated that her students would assume control over some aspects of this activity. She wanted them to be responsible for tracking and keeping everything in their own folder. She also wanted them to bring in materials that would be included in the portfolio. Phyllis's experience implementing the portfolio did positively impact student control. Her students successfully organized and maintained their file folders. Phyllis's students responded positively to the choice component of the portfolio system. They embraced the opportunity to make choices about the materials that they included in their portfolios. Phyllis's students made decisions regarding

how much effort they put into their portfolios. When Phyllis spoke about the portfolio system and making decisions about expectations, she consistently said “we”; I interpreted this as a reference to her and her students together (Field Notes, Individual Interview #1, February 14, 2001). Phyllis worked with her students to establish expectations. She took the process one step at a time and learned with her students.

Phyllis’s experience implementing the portfolio in her classroom allowed her to conclude that her students were “more conscientious about making sure that they [had] their materials and [had them in their portfolios]” (Individual Interview #2, May 24, 2001). Because the students were responsible for keeping their portfolios up to date in preparation for their final exam, Phyllis noted that her students assumed the responsibility for completing tasks. In addition, she observed that her students were “very goal oriented” (Individual Interview #2, May 24, 2001) in terms of completing their portfolios. Phyllis was also impressed by her students’ abilities to organize activities for themselves when Phyllis was busy conferencing with other students. They were aware of the fact that they had to organize activities that would not require teacher supervision.

In preparing for introducing the portfolio to her students, Phyllis expected her students to be honest about their experiences in physical education class. She expected them to take risks and express how they felt about their experiences. Phyllis acknowledged, though, that her students might feel vulnerable when admitting that they were not as good as they wanted to be at a physical activity.

Phyllis anticipated that her students would experience some anxiety with the

portfolio because of their past experiences with evaluation. She discussed that her students were concerned that imperfection would adversely affect their mark. One component of the portfolio that alleviated their anxiety was that they would not have to study for a final exam. Instead, they had to prepare for the final conference by participating in the portfolio activity. “The class expressed some anxiety about the idea of a final evaluation for physical education but after further explanation and assurances that if they collected all of the items and had their portfolio complete, the final evaluation would be very simple, [they were more relaxed]” (Participant Portfolio Reflection, March 18, 2001). In addition, Phyllis provided them with the questions ahead of time, which made the exam “unthreatening” (Group Reflective Session #4, May 8, 2001).

The portfolio system, Phyllis concluded, was a positive experience that did not promote student anxiety. Reflecting upon the portfolio experience, Phyllis stated: “I think the kids have found it nonthreatening, and I think they’ve kind of had fun just, you know, collecting stuff and keeping it in there” (Individual Interview #2, May 24, 2001).

Phyllis anticipated that her portfolio system would be a positive experience for her students because it would be individualized according to student need and ability. She stated, “there shouldn’t be anything in the portfolio that’s beyond a student’s ability” (Individual Interview #1, February 14, 2001). Phyllis recognized that a physical education class requires a lot of flexibility in terms of meeting students’ individual needs. The portfolio provided the opportunity to meet the requirement for flexibility.

The portfolio system also allowed Phyllis to pose questions based on each student's individual portfolio experience. This was especially true when preparing individualized questions for each student's final oral evaluation. Phyllis viewed the final conference as an opportunity to "coach students" (Individual Interview #2, May 24, 2001). "[One] question might lead into another—so you could kind of guide them from whatever their answer is, maybe into a little more depth into that idea" (Individual Interview #2, May 24, 2001). Phyllis was able to challenge her students to extend their thinking in terms of what they chose to include in their portfolio. She encouraged her students to use their "imagination" when adding to their portfolio.

In addition to providing students with activities that met individual needs, Phyllis also described the portfolio as focused on student success. One requirement of the portfolio system was to include evidence of accomplishment, "[evidence] of any accomplishment—so it could be a great big accomplishment—like a championship, or it could be just a certificate" (Individual Interview #2, May 24, 2001). This requirement challenged students to identify success in their lives. Phyllis believed that all her students could be successful at living an active, healthy life, and she challenged them to discover what success meant for each one of them.

The fact that the portfolio was directly linked to the final oral evaluation also allowed for the focus to be on student success. Phyllis allowed students the opportunity to be well prepared for the final evaluation by giving them the questions one week ahead of time. This process allowed students to accurately "prepare themselves and think about what they want to say" (Individual Interview #2, May 24, 2001).

Phyllis noted that her students had a positive attitude towards the portfolio when she introduced the concept. She did notice that her students responded more effectively when they had a chance to participate first in some physical activity. During the first group reflective session (March 27, 2001), Phyllis concluded that while her students resented losing activity time, they seemed “excited” that they were able to do “fun stuff” with the portfolio instead of just “work stuff.” When they saw Phyllis coming in with the portfolio cart, most of her students were excited to work on them. Phyllis did note that approximately 5 out of 20 students would say, “Oh, no. Not that again” (Group Reflective Session #3, April 24, 2001). She determined that these were the really athletic kids. Her students reacted positively to the fact that they had an oral final exam that was based on the contents of their portfolio, although the concept of conferencing as opposed to a written test took awhile for students to understand. Phyllis believed that her students struggled with this concept because “they [didn’t] have any framework” (Group Reflective Session #3, April 24, 2001). Phyllis’s students responded very positively to being able to make choices about what to include in their portfolios. Phyllis wanted to instill in students a positive attitude towards the work that they were completing and including in their portfolios. She did this by promoting honest choices and genuine effort when completing assignments.

Phyllis noted (Group Reflective Session #4, May 8, 2001) that her students did not like the “rubric marking.” She believed that this was “because it was ambiguous, very wordy.” Phyllis believed that the rubric marking did not allow her students to see where they went wrong, nor was it specific enough for the assignment that she was marking. Conversely, Phyllis’s students responded very positively to the



checklist for completeness. This allowed students to complete tasks that were incomplete. This was not evaluated. Phyllis concluded (Individual Interview #2, May 24, 2001) that her students reacted most positively to a body image assignment that was included in the portfolio because “it wasn’t marked by numbers and it gets to go into their portfolio as more of an opinion type thing,” “and it wasn’t wrong—nothing could be wrong.” Phyllis believed that her students liked that the portfolio was not consistently marked with numbers. They liked that they were able to express their opinions and that this was not “wrong”.

When implementing the portfolio system, Phyllis noted that the students were interacting with her and with their classmates. Her students were asking for Phyllis’s input regarding what they chose to include in their portfolios. Also, her students were feeding off the ideas of their classmates. Phyllis noted that her students enjoyed looking at what others had done with their portfolios. “[They] would look at each other’s pictures and stuff” (Individual Interview #2, May 24, 2001).

The final student effect that Phyllis discussed was learning. Phyllis’s goal was to use the portfolio to promote “healthy active living.”

[If] they’ve internalized the idea that I’ve got to stay active all my life and do something that I enjoy—it might be speed walking, it might be badminton—you know, it doesn’t matter—as long as they’ve internalized that feeling that I’ve got to keep active, I’ve got to keep exercising—I don’t care if they know rules to a game. (Individual Interview #2, May 24, 2001)

This was accomplished through the exploration of various concepts related to health and fitness within a global context as opposed to a specific context. She explained

that her students successfully used the portfolio to consistently relate new learnings back to old learnings. “[They] started picking things out—we’d be talking about something totally different—totally off topic—and they could relate it back to what we learned about body image stuff” (Group Reflective Session #3, April 24, 2001).

Phyllis noted (Individual Interview #2, May 24, 2001) that her students were able to apply what they learned to themselves.

Because I think—like they’ve done their food groups—you know we can learn all the Canada Food Guide—we can learn all that stuff—but I don’t know if they really apply it themselves and get to see how it might impact them over the course of their life. Like when we did the dietary analysis, they knew what was good and what was bad in it—in terms of choices, but we also did a lot of goal setting in that assignment. They had to state what they would change—two things they would change. Two things that were good. So they did really dissect it rather than just looking at it from the Canada Food Guide point of view. I think they looked at more a little bit from opinion kind of thing.

Student reflections demonstrated that they were “striving to do better in terms of what they’re picking” (Individual Interview #2, May 24, 2001).

*Teacher.* Her experience with the portfolio affected Phyllis as a teacher. The control she assumed, the anxiety she experienced, the relationships developed with her students, and what she learned about her teaching were all affected by the implementation of the portfolio.

As she anticipated using the portfolio in her classroom, Phyllis discussed control. She reflected on how she used to assume the responsibility for collecting and

storing student work. She anticipated that her students would take over some of this responsibility. In practice, she stored the portfolios together and brought them to class on days that they would be used. The students were responsible for maintaining their own portfolios.

Phyllis designed her portfolio system and made decisions about what kinds of tasks were involved in completing this activity. She decided what material would be evaluated and what would be assessed. Phyllis also assumed responsibility for determining required components of the portfolio. When she reflected on this process (Participant Portfolio Reflection, March 18, 2001), Phyllis explained her reasoning.

The portfolio was introduced to the class on [March 18]. The introduction, outline, focus and development of the portfolio was teacher organized and teacher directed. Since the portfolio materials will be used by the students when doing their mandatory 30% final evaluation I felt it was necessary for me to control the layout, format etc. of the portfolio to ensure that each students will have the required information and materials in order to answer the final evaluation properly.

Phyllis, though, relinquished much of the control after having established these guidelines. She negotiated with students in terms of what constituted evidence. She also worked with her students when establishing expectations. She also provided them with a couple of activities that were “pretty open ended” (Group Reflective Session #4, May 8, 2001). Because of this, Phyllis noted that she sometimes did not agree with students’ opinions or points of view but that she had to accept this. In terms of effort, Phyllis did not have control over this. The amount of effort that her

students put into the portfolio was up to them. Her students were aware that the information they included in their portfolios would be the foundation for the final exam. Phyllis hoped that this would motivate her students to put forth an “honest effort.” Phyllis had certain expectations and hopes for her students, but really it was up to them. For example, she hoped (Individual Interview #2, May 24, 2001) that her portfolio system would encourage her students to extend their thinking and to think about “life style,” “health,” and “fitness.” She realized, though, that her students would get out of the portfolio what they put into it.

One of the required components of the portfolio was the final oral exam that took place as a conference at the end of the school year. Phyllis explained this to her students. She determined the format, the questions, and the time frame. She provided her students with this information ahead of time, and it was up to them to prepare. Phyllis provided her students with a “nonthreatening” (Individual Interview #2, May 24, 2001) final evaluation.

Phyllis was responsible for choosing when to work on the portfolios during class time. She determined the times when her students would most effectively complete portfolio tasks. This was during health time and after students had completed physical activity during gym time. She broke the portfolio tasks into chunks that required small amounts of time completed on certain days of the week.

A second effect for Phyllis was anxiety. Phyllis expressed some anxiety over planning to conference with her students. She was concerned about not being able to adequately supervise the rest of the class when conferencing with individual students. At the end of the first group reflective session (March 27, 2001), Phyllis

demonstrated some anxiety when she stated, “[I’m] as clear as I can be being in a fog.” Phyllis was also concerned that she might not be doing enough with her portfolio system. She seemed intimidated when she saw Connie’s portfolio (Field Notes, Group Reflective Session #3, April 24, 2001). She stated that “[ours] won’t be that organized, you know. But I don’t think mine will come totally together until we do the final reflective session when they do their final exam” (Group Reflective Session #3, April 24, 2001).

Implementation of the portfolio system in her classroom allowed Phyllis to develop a relationship with her students. She stated that the portfolio allowed her to get to know the kids “on a different level” (Individual Interview #2, May 24, 2001) through the material that they included in their portfolios. Getting to know her students in this way usually occurred only when Phyllis was involved in coaching students. The portfolio, though, enabled her to get to know more about her students’ lives outside of school, including their personal interests. Phyllis discovered that the portfolio allowed her insight into her students’ decision-making processes. Phyllis learned that her students were “me” focused and described them as unable “to consider others or extend to others” (Group Reflective Session #4, May 8, 2001). She saw her students as “not good at thinking about other people, other people’s points of view, and things like that” (Group Reflective Session #4, May 8, 2001). Specifically, when students were expected to investigate concepts being taught in class through role play or imagination, their situations consistently focused on themselves and not others. Phyllis noted that they were not “inclusive” (Group Reflective Session #4, May 8, 2001). She determined that her students “don’t see

other people's opinions very well, they don't like when you have them have to portray an idea that they don't really like" (Group Reflective Session, May 8, 2001). Her students were not willing to extend beyond the conclusions that they wanted to draw. Although this discovery "disappointed" (Group Reflective Session #4, May 8, 2001) her, it also allowed her the opportunity to learn more about her students, for example their weaknesses and their perspectives.

A final impact on Phyllis as a teacher was that the portfolio provided her with information about her teaching. Her discovery about her students' "me" (Group Reflective Session #4, May 8, 2001) focus helped her realize that her students need to explore the concept of empathy. Phyllis also became aware of her own decision-making and design of assignments. She learned that she could no longer provide students an assignment, have them hand it in, mark it, and then forget about it. Instead, all the tasks were connected to a final evaluation and therefore were revisited and reapplied in various contexts for different purposes.

*Curriculum.* The portfolio system used in Phyllis's grade 10 physical education class affected the curriculum both positively and negatively. This was the first year of implementation of the new grade 10 curriculum. As a result, this year represented Phyllis's first experience with this revised course.

When Phyllis talked about her plans for her portfolio system, she clearly stated that she wanted to ensure that the portfolio worked within the expectations of the course and that it did not compromise the integrity of the course (Field Notes, Individual Interview #1, February 14, 2001). She was fearful that the portfolio and the 30% final evaluation would adversely affect the course by taking away from time

spent on the activity components of her curriculum. Her biggest concern was that the course would become something that the kids were not expecting and that they would not enjoy it and, as a result, not take additional physical education classes in the future. In response to this concern, Phyllis designed a portfolio system that complemented the curriculum requirements. Her focus was to provide an opportunity, through the portfolio, “[to teach kids] the value of fitness” (Individual Interview #1, February 14, 2001). Phyllis reiterated this goal throughout the group reflective sessions, the final individual interview, and her participant portfolio. She required that all academic work, including assignments and tests, compose the contents of the portfolio and reflect the strands of the new curriculum. In addition, she used the health blocks to work on portfolios and found time here and there at the end of classes.

In designing her portfolio system, Phyllis noted that she had flexibility when it came to assessing and evaluating the expectations mandated in the curriculum. She could choose the type of assessment or evaluation method that best suited the expectations taught. For example, Phyllis decided to do a project as opposed to a test at the end of a health unit. Phyllis also noted that she was able to choose assessment or evaluation methods that best suited the needs of her students while at the same time meeting the mandated curriculum expectations. For example, when teaching the expectation that required students to reflect on the consequences of sexual choices, Phyllis designed a task that allowed students to explore decision making without expressing actual personal experience. These assessment or evaluation tasks then became part of the students’ portfolios.

The portfolio system that Phyllis designed enabled her to expand on what had previously been taught in physical education. Because the previous focus had consistently been placed on activity, there had not always been time to spend on other important issues. Phyllis found that she was able to extend curriculum expectations into experiences that allowed her students to explore their perception of health, fitness, and lifestyle. Her goal was to challenge her students to consider life-long fitness and healthy active living, which was the basis of the curriculum itself.

Although Phyllis discussed positively that the portfolio enabled her students to spend time exploring important issues related to fitness in a nonactivity context, this issue of activity time was the one negative curricular impact. Phyllis noted that the portfolio did take away from the time spent being active in physical education class. I noticed consistently throughout the study that this concern continued to challenge Phyllis and that it influenced many of the decisions that she made about the portfolio in her classroom (Field Notes).

*Professional development.* Phyllis's experience planning and implementing her portfolio system was sustained by a professional development format that consisted of an expert and three colleagues involved in the same process. Phyllis's participation in this professional development experience allowed her to glean support and to demonstrate her ability to support her colleagues.

As the expert, I provided Phyllis with some advice that supported her in her first experience implementing a portfolio system. She was encouraged by my advice to start small. She realized the importance of taking the process step by step. Phyllis concluded, in order to ease her anxiety, that implementation of the portfolio needed to



happen in “baby steps” (Group Reflective Session #4, May 8, 2001). She discussed the training sessions during our final individual interview. She explained that it was important for her that I showed her exactly how to set up a portfolio system and provided her with choices at specific stages that allowed her to individualize her portfolio system. One such choice that she appreciated was being able to decide whether to assess or evaluate the portfolio. This training process allowed Phyllis to get her system organized with specific direction. Phyllis also appreciated being encouraged to think about things that she might not have on her own. She also noted that she did not have access to a lot of information about portfolios. Phyllis felt very knowledgeable based on the information I passed on to her. Working with an expert in setting up her portfolio system provided Phyllis with direction. She expressed that she was uncertain about her portfolio system because she had never seen anything like this done before. “I felt like I leaped ahead in terms of my knowledge of what might work, what won’t work, and choices I have” (Individual Interview #2, May 24, 2001). Phyllis was challenged to use her experience to provide similar expert support to her own department members implementing the portfolio for the first time. “[Somehow] I’m going to have to impart that onto the others—so that they can feel that sort of success with it rather than just dumping and saying, ‘This is how we’re doing it’” (Individual Interview #2, May 24, 2001).

Throughout the group reflective sessions, I observed that Phyllis displayed attentiveness and concern for the 3 other participants (Field Notes). She consistently commented on their discussions and provided suggestions and insight. She often asked for clarification when she did not fully understand what the other participants

were describing. Phyllis provided the other participants with affirmation when they described something positive that they had accomplished or experienced while implementing the portfolio. Phyllis's active participation in the group reflective sessions, including bringing in samples of student work, provided all participants with ideas about what to include in a portfolio.

Phyllis felt supported by the group of participants. This group of colleagues provided Phyllis with ideas and encouragement. She was able to explore ideas, see samples of what other teachers were doing, and hear about the experiences of others. This support reaffirmed for Phyllis her own expectations of what she should be seeing from students.

The support of colleagues provided Phyllis with confirmation that what she was doing was "okay." In addition, she felt better prepared for implementing the portfolio in the future because of this experience.

I feel like I've got a lot of these assignments kind of in place now. I understand how the flow of them will go—now I can add other things to it with the kids as we go along. Because it's hard making it all up. You've got to make it all up and trouble shoot, we're going to have problems, pitfalls, and so on. (Group Reflective Session #4, May 8, 2001)

She believed that the established outline would make it easier to implement the portfolio in the future.

*Connie*

*Profile.* Connie had some previous experience using the portfolio. Over the past 2 years, she developed and used an employability skills portfolio system in the

co-operative education department at her school. Connie's experience with this portfolio system was very positive. She was interested in revamping her system, though, and was seeking some guidance. When the study began, Connie had already introduced the portfolio system to her students and they had begun to develop their portfolios.

*Teacher attitude.* Connie's positive attitude to the portfolio was evidenced through her motivation to use it in her classes as well as her attitude towards the portfolio before, during, and after implementation.

Connie was initially motivated to use the portfolio because she believed that her co-operative education students needed a way to collect evidence and to reflect on this evidence as it related to the Conference Board of Canada employability skills. Furthermore, she supported recent curriculum changes and believed that the portfolio was a tool that could enable her to fulfill the new curriculum mandate and, at the same time, serve her students. Connie viewed the portfolio (Individual Interview #1, February 21, 2001) as "a good exercise for the students" and as "a solid piece of evidence for the students to work through."

Connie described her motivation to become involved in this study as "selfish" (Individual Interview #1, February 21, 2001). She stated that she wanted to be involved in order to confirm that her approach was the best that it could be. She wanted to be sure that she was accurately applying assessment and evaluation practices mandated by the government. I noted during our first individual interview (Field Notes, February 21, 2001) that her focus seemed to always come back to the fact that she wanted to ensure that she was providing the best education for her

students. Connie also approached her participation in this study out of interest. She initiated the use of the portfolio in her own department and had an interest in learning more about this topic.

Connie's attitude, from the onset, was positive. Her focus was in preparing her students for the next stage in their lives (Field Notes, Individual Interview #1, February 21, 2001). Connie was eager to make the portfolio system work for her students. She took pleasure in watching her students learn and grow through their portfolios. She truly wanted her students to have the opportunity to share their achievements and accomplishments through their portfolios. Connie was very enthusiastic about her students' products and was especially pleased with the reflective component of the portfolio. She was excited and fascinated by the fact that her students were learning about themselves and others and that she was learning more about her students.

Through the process of implementing the portfolio in her classroom, Connie was motivated to develop her own portfolio. She did this for herself but also as a model for her students, as described during the first group reflective session (March 27, 2001).

[It] was almost one of these things that I almost felt a little bit hypocritical up at the front of the class telling the kids that it would be good for them to have it. And I thought, one of these days, someone is going to say—well, why don't you show us yours?

Once Connie started to develop her own portfolio, she quickly realized that this was something that she wished she had started years ago. She described herself as a

“fairly sentimental type of individual” (Group Reflective Session #1, March 27, 2001) and realized that she had missed out on some opportunities to showcase her accomplishments. I realized when she was talking during this first group reflective session that Connie found the courage to start her own portfolio through the process of implementing it with her students (Field Notes, March 27, 2001). This was a very rewarding experience for Connie.

For Connie, the portfolio process was evolving; it was a discovery. She was constantly thinking about ways to improve the portfolio “next time.” She anticipated the arrival of her students next year. She wondered how their approach to the portfolio might be different. She wondered if they might have already worked with the portfolio, and, if so, how they might have been affected by their previous experience. She concluded by describing her experience as positive and rewarding. Her only regret was that she had not started implementing portfolios in her classes earlier in her career.

*Portfolio structure.* Connie was very clear that her students owned their portfolios. She reinforced this with students when she introduced the portfolio system on the first school day. She told them, “It’s your property and you are responsible for its contents and development” (Participant Portfolio Reflection). The students assumed this ownership and valued it. Connie did specify that the students would have to share their portfolios with her and possibly with their co-op supervisors.

The criteria for Connie’s portfolio system were clearly articulated to students in the introduction and on handouts they received (Appendix H). Her focus was on

her students' participation in the process, which involved meeting the following specified criteria: fundamental skills, personal management skills, and teamwork skills (Appendix I). All materials were expected to be word processed (Connie noted during a member check that this did not always happen) and organized in plastic sheet protectors for a neat and professional appearance.

Students were expected to include a personal résumé, a table of contents, three employability skills title pages, and 15 samples with reflections attached. They were also required to complete a submission on "Gaps and Goals" (Appendix J). This enabled students to identify skill areas where they might have "gaps" and therefore needed to set "goals" in order to ensure that they are able to demonstrate that specific skill. Students also had to complete a reflection based on the question, "At this point now in the portfolio, how do you feel about the process?" (Appendix K).

The students chose most of the material included in the portfolio. The only required piece of evidence was their personal résumé. Other materials that might have been contained in the portfolio included projects, tests, assignments, academic achievements, essays, subject awards, driver's license, coaching certificates, life guarding certificates, St. John's Ambulance or Red Cross course certificates, or report cards. All samples were required to have a reflection attached which involved students explaining why they had included specific pieces of evidence and what that piece of evidence represented (Appendix L). Students were also asked to reflect on experiences (Appendix M).

Review of the portfolio system was both formal and informal. Before the students went out to their placements, Connie reviewed their portfolios. At this point,

she verified that they had included their personal résumé, a table of contents, the three title pages, and one piece of evidence with a reflection from each of the three skill areas. The students kept track of all additions to their portfolio using a summary sheet (Appendix N). At the first review, Connie went through this checklist. The students were expected to complete two self-assessments in order to help identify areas for improvement. The “gaps and goals” submission also provided students with the opportunity to review their portfolios in order to identify areas that might not be complete. “[Through] the thinking process of the self-assessments and looking at the areas of the portfolio—where is there an area—or where’s a goal that they can set for themselves” (Individual Interview #1, February 21, 2001). The portfolio was collected again in March 2001. At this point, Connie reviewed another two pieces of evidence with reflections in each of the three skill areas. These first two reviews were for assessment purposes, and the checklist was used to organize completed work. These reviews took the form of conferences, along with both written and verbal feedback provided to students. Apart from the specified review dates, there was also an opportunity for students to receive informal feedback each Monday through a conference with Connie. These conferences allowed Connie to review student log sheets and to discuss the portfolio. In terms of the portfolio, the purpose of these reviews was to highlight areas of improvement in preparation for the last portfolio review. Connie also used these reviews to provide students with personalized comments that gave “encouragement” (Group Reflective Session #2, April 17, 2001). That is, she validated her students’ individual experiences. The final review of the portfolio took place in June, and students were expected to have

completed two more pieces of evidence with reflection in each of the three skill categories. This was an evaluation that focused on determining whether or not the students had successfully participated in the portfolio process by following the criteria.

*Purposes of the portfolio.* Connie identified skill development, reflection, learning, assessment, and evaluation as the purposes for the portfolio she developed. The main focus of the portfolio was to showcase skill development in three specific areas through the use of reflection. Connie believed that reflection resulted in learning. The portfolio process was then assessed at two intervals and finally evaluated at the end of the semester.

I noted during our first individual interview (Field Notes, February 21, 2001) that I was impressed by Connie's ability to clearly articulate her chosen portfolio structure and that she had a clear understanding of the rationale for the components she included. The three skill areas were tailored after the Conference Board of Canada's employability skills and included academic or fundamental skills, personal management skills, and teamwork skills. In order to showcase academic skills, students included samples of classwork that demonstrated "progression in how well they moved through a course and how well they met teachers' expectations" (Individual Interview #1, February 21, 2001). In addition, the samples of academic skills allowed students to demonstrate "commitment" and "hard work" (Individual Interview #1, February 21, 2001). The section on personal management skills allowed students to demonstrate their diversity and their involvement in various situations that might be attractive to an employer. Connie identified this section as



not “purely academic” (Individual Interview #1, February 21, 2001) but connected to the academic skills. For example, a student might demonstrate that they were involved in an extracurricular activity and had maintained good grades because they were able to manage their time. The section on teamwork skills highlighted areas in students’ lives where they had the opportunity to work as a member of a team. This team could be school based or community based. An example that Connie gave was being a member of a sports team. Each skill area was supported by a piece of evidence that represented achievement.

The reflection component of the portfolio enabled students to articulate which skill each piece of evidence represented. The student described the significance of the artifact through an explanation of why it was included and what it “[demonstrated] about themselves or about their learning” (Individual Interview #1, February 21, 2001). The idea was to encourage students to think about the process involved in each significant experience they described. This purpose developed students’ “ability to stand back and reflect, hopefully objectively, on a piece of evidence” (Individual Interview #2, May 22, 2001). If students did not have an artifact to represent an experience, they wrote a “reflection on experience” (Individual Interview #1, February 21, 2001). The purpose was to articulate the “significance” (Individual Interview #1, February 21, 2001) of each submission.

Learning was another purpose of the portfolio system designed by Connie. Learning was directly linked to reflection; in fact, reflection was the key to learning. Connie stated that the reflection process “[provided] a real learning opportunity for the students” (Group Reflective Session #4, May 8, 2001). Connie was able to see

her students' learning through their ability to reflect on specific experiences. For Connie, the portfolio proved to be more than just gathering examples. She was able to see her students "working through that whole process—the thought process, and taking time for themselves to assess—to communicate or articulate to others the significance" (Group Reflective Session #2, April 17, 2001). Connie described learning as growth. "I think there's been some growth on their part in terms of the time they're taking to reflect back on what they're putting in their portfolio as well" (Group Reflective Session #4, May 8, 2001).

Assessment of the students' portfolios involved self-assessment and teacher assessment. The purpose of self-assessment was to encourage students to recognize areas of skill development that needed improvement. Teacher assessment, by student initiative, could take place informally each Monday through student conferences. In addition, Connie collected the portfolios twice for assessment. This process involved reviewing students' checklists to ensure that they had all of the required components and to provide feedback to promote improvement and to recognize student achievement to date.

Evaluation of the student portfolio was another identified purpose. Connie evaluated student portfolios at midterm and again at the end of the semester. Her evaluation focused on "the students' ability to work through the process" (Individual Interview #1, February 21, 2001). She did not see the evaluation as an opportunity to judge student choices. "I would feel very uncomfortable actually putting a value to a particular submission that a student had included in [his/her] portfolio" (Individual Interview #1, February 21, 2001).

Connie did not believe that her students were motivated by marks. She reflected on this during our first individual interview (February 21, 2001). “The marks—as I say—it doesn’t seem to be a major focal point for the students I’ve worked with.” She believed that the amount of effort that her students put into the portfolios was the result of some other motivation “within themselves to really put it together and keep the process going.” In fact, Connie herself, throughout the individual interviews and the group reflective sessions, downplayed the role of evaluation (Field Notes). She definitely believed that evaluation was a purpose of the portfolio, but only because it enabled her to make a judgment about student success working through the portfolio process. “I think what we really need to focus on is the whole process and their ability to follow through in some very concrete criteria rather than getting subjective on what they have put in there.”

*Challenges.* Connie’s experience implementing the portfolio with her cooperative education students presented specific challenges. These included time, classroom, students, curriculum, and materials.

Time was a challenge that presented itself from the onset. Connie believed that she did not provide “sufficient time” (Individual Interview #1, February 21, 2001) when introducing the portfolio concept to her students. She was aware that her students required more than the allotted 30 to 45 minutes to “digest” (Individual Interview #1, February 21, 2001) the material presented. One additional challenge was that Connie met with her students as a group for only 6 or 7 days at the beginning of the semester before they began their co-op placements and were, therefore, out of the school. This in-class time was used to prepare the students to enter their job

placements. After students entered the workplace, Connie met with some students on an individual basis every Monday. Her students were together as a group only once every 3 to 4 weeks for the rest of the semester. Time with students was very limited.

The Monday conferences with students were limited by time. Connie met with students when they dropped in during the school day. She found that each conference took longer than she anticipated. As a result, Connie tried to make herself available Tuesdays through Fridays during lunch periods, when she was in the school. Time to conference one-on-one with students was scarce because Connie also had to monitor students at their workplaces. This was challenging, because if a student wanted to talk about something, a couple of days would often pass before Connie and the student were able to meet together. It was obvious through the individual interviews, the group reflective sessions, and her participant portfolio that Connie spent a lot of time thinking about how to make more time to meet with her students (Field Notes).

Connie's classroom was nontraditional in the sense that she did not have a specific space where students met on a day-to-day basis. As a result, students worked on their portfolios on their own time. This was a challenge for Connie because she was not able to work with her students daily on the portfolio. She was not able to provide "the regular day-to-day little reminders" (Group Reflective Session #1, March 27, 2001) to her students as a group. Also, Connie sensed that she missed out on the "day-to-day where you hear the little tidbits of conversation [that take] place and some of the thinking" (Group Reflective Session #2, April 17, 2001). Connie hoped to provide her students with the opportunity to have a class discussion about

their feelings towards the portfolio because she did not find that she was always able to accomplish this through individual conferences.

Students were also a challenge for Connie. Initial student reaction to the portfolio was varied; some students responded positively and others did not.

[It] was a small percentage of students who bought into the concept immediately. There were a small percentage of students who thought this was absolutely a useless task that we were asking them to complete. But clearly the majority were somewhere in the middle. (Individual Interview #2, May 22, 2001)

Connie attributed this to the fact that not all of her students viewed the portfolio as important.

When I look at the caliber of students that we have—and just their interests—the one thing that I find in working with—and it's mainly the guys out in the skill trade areas—let me have a wrench in my hand or let me have sandpaper or let me do the job. Don't ask me to do a lot of writing for you. I'm not into writing. I'm not into keeping certificates of something that I did. They don't see that as important. Whereas more so the—and I don't want to say stronger academic because there are some pretty bright kids out there in the skilled trade areas, but more so those who are thinking university—are very—what I've seen—very accepting of the process. (Group Reflective Session #1, March 27, 2001)

As the portfolio process continued through the semester, Connie continued to note changes in individuals' responses to the portfolio. She described (Group Reflective

Session #2, April 17, 2001) students who took the process “quite seriously,” students who were “anxious for feedback,” and students who didn’t approach the portfolio “as we would like for them to do.” Connie hypothesized that previous experience with the portfolio affected student reaction.

Connie described her students as having a “range of abilities” (Individual Interview #1, February 21, 2001). The diversity presented itself both in academic ability and community involvement. For this reason, Connie was challenged to examine the process followed by each individual student in order to discover the uniqueness of each experience as expressed through the portfolio. “[We] have some [students] who by the end of the first week probably could have their portfolio to a point that we would be looking for at the end of the semester. And then there are those who truly struggle[d]” (Individual Interview #1, February 21, 2001). She noted that she usually had “a couple of students each semester who really [had] very little to put in” (Group Reflective Session #2, April 17, 2001). It was important for Connie to understand that the experience was easier for some than for others and to recognize that each was individually valuable. Also, because of the diversity in academic backgrounds, Connie noted that some students struggled with tasks that other students easily completed. “So the kids who are good goal setters, they could look at what we’d asked of them and they knew what we wanted, but for students where that’s maybe not something they’re accustomed to doing, they were floundering with it” (Individual Interview #2, May 22, 2001). Connie acknowledged (Individual Interview #1, February 21, 2001) that her students were not “very mark conscious”

but thought that “higher academic students” might challenge the marks they received for their portfolios.

Connie was aware of the new curriculum changes. Because she taught grades 11 and 12, she was not affected by the changes but would be next year. In anticipation of the new changes, Connie was preparing to meet the curriculum requirements. Connie stated that she supported the curriculum changes but that new assessment and evaluation requirements presented a challenge for her. She attempted to interpret the requirements and to apply them appropriately. This included creating a rubric (Appendix O) that reflected the achievement chart mandated by the Ministry of Education. She was concerned, though, that the levels of achievement were too vague for her students.

Connie required that students purchase plastic sheet protectors to organize the contents of their portfolios. In the past, the school store was open and sold these plastic sheet protectors to students for 10 cents each sheet. This year, the school store was not open. As a result, Connie was unable to provide this service to her students and they had to purchase the sheet protectors elsewhere, more than likely at a higher cost.

*Effect.* Connie described the effect of using the portfolio in terms of her students, herself, the curriculum, and the classroom environment. Student effect included attitude, anxiety, control, focus on success, learning, individual representation, interaction, and risk-taking. Teacher effect included control, relationship development with students, information about teaching, and anxiety. Curriculum and classroom environment effect were both positive.

*Student.* When Connie introduced the portfolio, initial student response was varied. The attitudes ranged from very positive to very negative. As the students worked through the portfolio, the attitudes became more consistent. Students began to feel more positive about the portfolio process. Still, a few remained negative. Connie believed that the more students worked on the portfolio, the more worthwhile it became, and this positively affected student attitude. Also, as students became aware that the portfolio was a requirement of co-operative education class, they were more “accepting” (Group Reflective Session #2, April 17, 2001). Connie did not believe that all students fully accepted the portfolio and benefited from it. She did acknowledge, though, that students were asking for assistance and trying to develop a portfolio that met the expectations instead of “just letting it go” (Individual Interview #2, May 22, 2001). Connie concluded that, towards the end of the semester, she had not heard any student express “negativism” (Individual Interview #2, May 22, 2001) in regards to the portfolio.

Connie’s students were initially motivated to begin working on their portfolios because they had to complete their first submission prior to going out in the workplace. Connie shared her thoughts about these reactions during our first individual interview (February 21, 2001). As the students worked through their first submission, they recognized the portfolio as a valuable experience. “[They] were getting excited about the process and they were anxious to see what was going to happen throughout the semester.” “I truly find when they come in and we . . . spend time with them and their initial submission going through it, they are pretty enthusiastic and want to share the different pieces and why they are there.” Students



were “excited” about the portfolio process. “[They’re] anxious to show what they have done, what they have put in—and maybe it’s—for some of them the first time that another adult has really taken an interest in what they’ve accomplished.” As the students moved through the portfolio process, they were motivated to complete it because they could see its development and because they recognized the real-life applications of the portfolio. Most of her students did not even seem to be affected by the “mark aspect” of the portfolio. They were “concerned that they have the submissions, that they are valid submissions that are being included, and that there are opportunities for additional pieces.” Others (about 15%), though, were doing the portfolio simply because it was marked. All students felt good about the acknowledgements they received from Connie.

Connie’s students did experience some anxiety with the portfolio. She stated that her students seemed overwhelmed when they were initially introduced to the portfolio. Connie thought that this was related to the fact that students did not have enough time to think about the direction that their portfolios would take. The students acknowledged that the “start-up process” (Individual Interview #1, February 21, 2001) was “difficult” (Individual Interview #1, February 21, 2001) for them. They were “overwhelmed” (Individual Interview #1, February 21, 2001) by the work that they had to do. Connie believed that providing her students with portfolio samples served to ease their anxiety. For some students, it was difficult to “highlight their successes” (Group Reflective Session #4, May 8, 2001). They were uncomfortable with this because they thought of it as “boasting” and “bragging” (Group Reflective Session #4, May 8, 2001).

Connie's students worked quite well through the first and then the second submission, but they were "a little panic stricken" (Individual Interview #1, February 21, 2001) in preparing for the third submission because they were "wondering where they [were] going to come up with additional pieces of evidence" (Individual Interview #1, February 21, 2001). For some students who were working through the portfolio for the first time, they would reach a point where they could not continue because they were unsure and needed some assistance.

[There] are people who are now finding it difficult in terms of appropriate examples to include in their portfolio. So they are feeling overwhelmed with that. Feeling a little bit frustrated that they may not have anything else to add to their portfolio, knowing that there is still one more submission to come, in which they are supposed to have additional examples included. So I have had a couple of students specifically sit down and were frustrated. I think almost, too, a little bit embarrassed that they felt at this point in their life they didn't have more to add to it. (Group Reflective Session #2, April 17, 2001)

Connie was also concerned that those students who "struggled with each piece" (Individual Interview #1, February 21, 2001) might be intimidated by what others had accomplished and that their efforts might be discouraged. Those students, who classified the portfolio as "stupid" (Group Reflective Session #2, April 17, 2001) sometimes presented this feeling of intimidation.

Connie's students assumed control over certain aspects of the portfolio system. From the beginning, students were aware of due dates, criteria, and expectations. They were required to complete self-assessments of their portfolios and

to house a checklist of completeness. This process enabled students to identify areas for improvement and to take the necessary steps to ensure that they completed the portfolio as required and that they established goals for their own achievement. The weekly Monday conferences enabled students to “request feedback” or to seek “clarification” (Individual Interview #1, February 21, 2001). This component of the portfolio process encouraged students to seek a better understanding of what was expected of them.

Students were responsible for choosing the samples included in their portfolios. The students chose samples from all experiences including school, home, and community. They started to integrate the portfolio into these aspects of their lives by looking at every experience as a portfolio opportunity. Students were encouraged to be creative and to represent themselves through the portfolio.

Connie’s students never requested additional responsibility in terms of establishing portfolio criteria or expectations. This was one area where she wanted students to become more involved. Connie thought that this additional responsibility might “promote more enthusiasm” (Individual Interview #1, February 21, 2001).

The portfolio system that Connie designed allowed students to focus on their successes. Connie, in fact, described the portfolio as a “collection of success” (Group Reflective Session #4, May 8, 2001). Students included artifacts that represented personal achievements of which they were “particularly proud” (Individual Interview #1, February 21, 2001). Students were able to identify what success looked like for them. This perception of success was different for each student and often reflected a task that was completed to the best of a student’s ability. The portfolio allowed

students to “showcase” (Individual Interview #2, May 22, 2001 and Participant Portfolio\*Reflection) for themselves, their teacher, and their employer what they had accomplished and what they had to offer. In addition, the portfolio enabled students to see how they had progressed over the semester. “It allows a forum . . . for the students to talk one on one and to highlight for me their accomplishments . . . which in some cases I have felt that there are students out there who have never really been given that opportunity” (Individual Interview #2, May 22, 2001). Connie believed that this enabled students to focus on the “value of their accomplishments and successes” (Individual Interview #2, May 22, 2001).

The portfolio provided students with the opportunity to see how they grew as learners. When choosing to include examples of experiences, students were learning from the actual experiences themselves. In addition, students were learning about themselves. Through the process of reflection, Connie’s students questioned the choices they made and articulated what they learned. Connie witnessed learning by examining where students’ thinking began and where it ended up. She provided an example of a student who included his insurance policy as an artifact. Connie initially thought that this sample was “stretching it a bit” (Group Reflective Session #2, April 17, 2001), but she changed her mind after she read the reflection.

[The] reflection, it went on to say that in order for him to drive, he had to be able to pay for his own insurance. So in order to pay for his own insurance, then he had to get some sort of a part-time job. But he still needed to balance the part-time job with school and to save the money for a goal that he had set in terms of being able to afford this insurance. So I thought, okay, so then in

summary he said something to the effect, then I know that I am able to set goals and I can work toward achieving goals. And this is basically my piece of evidence to show that. (Group Reflective Session #2, April 17, 2001)

This student was able to demonstrate learning through his ability to reflect on a specific experience. Connie believed that it is “a true learning experience for the [students] to really stop and think why they are putting in that particular piece of evidence” (Group Reflective Session #2, April 17, 2001). The process involved in thinking through an experience and articulating that experience to others represented learning. Connie’s students took this ability “to stop and reflect” (Individual Interview #2, May 22, 2001) and applied it to other aspects of their lives. Connie interpreted this to demonstrate “maturity” (Individual Interview #2, May 22, 2001) on the part of her students.

Connie’s students also learned about employer expectations through their portfolios. They developed an understanding that there was a “connection” (Individual Interview #2, May 22, 2001) between what their present employer expected and the skills they could demonstrate to a future employer. Student awareness of their own skills extended beyond “level of expertise and knowledge” to include “teamwork,” “leadership,” and “communication” skills (Individual Interview #2, May 22, 2001).

The portfolio represented and met the needs of each individual. Each student experience with the portfolio was different. Connie discussed this issue and concluded that “students got out of the portfolio what they put into it.” She described one student who chose to include a “getting-to-know-me” (Individual Interview, May

22, 2001) section at the beginning of her portfolio. This was not something that was required; the student made the choice to provide this information about herself as an individual. Connie believed that the portfolio provided her students with “freedom of expression” (Individual Interview #2, May 22, 2001). She also noted that her students would freely admit that the portfolio was a process that they did for themselves, not for anyone else. She acknowledged (Individual Interview #2, May 22, 2001) that the portfolio had personal value in terms of “growth” and “development.” She stated “the portfolio, if they decide to keep it going, is something that will grow with them as they either enter the work force after graduation or go on to college or go on to university” (Individual Interview #2, May 22, 2001).

Students viewed the portfolio as “their personal piece of property.” They assumed “ownership for it” because they realized that it was a reflection of who they were. They “[developed] a piece of work that is so representative of who they are as individuals and what they’ve accomplished and how that may be important to an employer” (Group Reflective Session #2, April 17, 2001). Connie believed that the portfolio motivated students because it was a reflection of themselves. The reflection component of the portfolio, in particular, made a statement “about them as individuals” (Group Reflective Session #2, April 17, 2001). In addition, the focus of the portfolio content was on individually chosen artifacts that represented significant experiences. “[What] somebody would think would be a bit of a joke going into their portfolio, someone else has worked very hard in order to achieve or accomplish that” (Group Reflective Session #4, May 8, 2001).

Through the portfolio process, students interacted with Connie, especially those who struggled with what constituted evidence. These students sought her out and engaged in conversation surrounding the portfolio. This dialogue served to reduce student anxiety and to positively develop a student-teacher relationship. She described her experience with two students. “I felt . . . that both students left not feeling in as much despair as when they came in” (Group Reflective Session #2, April 17, 2001). Connie noted that her students interacted with each other as well. This interaction was based on students being interested in what their peers included in their portfolios. From this interaction, student-student relationships developed.

Because the students were responsible for choosing the evidence to include in their portfolios, this involved students taking risks. The students were told that their portfolios were limited only by their “imagination” (Group Reflective Session #1, March 27, 2001). Therefore, students were challenged to acknowledge that some of their experiences were worthwhile and that they represented achievement. For some students, this was taking a chance in admitting that they saw value in an experience that others might not. In addition, some students found the courage to ask their employer for a reference that they could include in their portfolio. Connie believed that the students were “freer” (Individual Interview #2, May 22, 2001) when they were being assessed because they knew that there would not be a mark associated with the thoughts they expressed. Connie noted that knowing what is expected of them, her students were better prepared to take risks because they clearly understood the framework.

*Teacher.* Connie had control over the design and delivery of the portfolio system for her co-operative education class. All co-operative education students were aware of the portfolio requirements prior to registering in the class. Once the semester began, Connie prepared a handout package that she provided to her students and supported this with an introductory session. As part of this session, she outlined what an employability skills portfolio was, what the portfolio looked like, why it was important to develop an employability skills portfolio, what the portfolio allowed students to do, how the portfolio was organized, what materials to include, who had ownership over the portfolio, when it would be assessed and evaluated, and how it differed from other goal-setting activities.

[The] portfolios were introduced to our students at the very beginning of the semester—a hand-out package consisting of approximately 10 pages and it was given to the students at that time in which each page was reviewed. It was somewhat prescriptive in nature in that it outlined what our expectations were of the students, with the portfolio tailored after the Conference Board of Canada Employability Skills (Individual Interview #2, May 22, 2001).

The students were also given reflection sheets that could be photocopied or used as a template for the reflection component. In addition, Connie provided students with the checklist and a table of contents template that they had to keep in their portfolio. During the portfolio review, she completed this checklist for students. Connie's portfolio criteria included specific portfolio sections, a personal résumé and title pages for each section. There was also a focus on "professionalism" (Individual Interview #1, February 21, 2001), so Connie required that all work be word



processed, and she encouraged students to use a three-ring binder and plastic sheet protectors. Connie established all due dates and passed this information on to her students during the initial introductory session. Connie introduced the concept of goal setting through her “gaps and goals” portfolio section. Connie did not assume that her students knew how to set goals. She took the time to ensure that they practiced and understood this task. Connie also spent time reviewing the reflection process because “it was new” to her students.

For Connie, there were certain aspects of the portfolio that required her to relinquish control. First of all, Connie’s nontraditional classroom did not allow for her to discuss portfolio issues on a day-to-day basis. Connie relied on students to recognize when they needed feedback or clarification and to seek her out. She did make herself available every Monday for conferences, but she had no control over whether or not the students chose to take advantage of this time. Each individual student chose the artifacts that were included in the portfolio, and Connie was not comfortable passing judgment on what she would consider appropriate evidence. She did provide suggestions and examples, but the students were able to make choices about what evidence they wanted to include in their portfolios. Connie was adamant about not wanting to “stifle any creativity” (Individual Interview #1, February 21, 2001). Connie also allowed the students to interpret her expectations and criteria in a manner that represented their individual experience.

I’m a firm believer in that, as teachers, we can set the guidelines and we can give suggestions for improvement if needed, we have to provide that opportunity, but ultimately it’s the student’s decision whether or not he or she

is going to take our feedback or our input to improve it. (Individual Interview #2, May 22, 2001)

From the beginning, Connie used the portfolio as a vehicle to develop relationships with students. After having introduced the portfolio to her students, she talked about having “opened the door for the kids to come in and talk” (Individual Interview #1, February 21, 2001). Students frequently sought Connie’s advice regarding what evidence to include in their portfolios. In addition, she was able to learn about her students’ academic, community, and personal lives, as well as their “interests” (Group Reflective Session #2, April 17, 2001) and their “accomplishments” (Individual Interview #2, May 22, 2001). This resulted in Connie getting to know her students “on a little different level” (Individual Interview #2, May 22, 2001). “[With] some of the reflections you really get to know your students better—that is such a wonderful vehicle for learning more about them” (Group Reflective Session #2, April 17, 2001). She also recognized that the portfolio enabled her to get to know all of her students.

Because there are so many students who—I never would have realized if I hadn’t been, you know, using the portfolio as a vehicle—I wouldn’t realize some of the accomplishments that students who I have out this semester—what they’ve done. (Individual Interview #2, May 22, 2001)

This knowledge allowed her to demonstrate genuine interest in her students and their achievements and to even make a “connection” (Group Reflective Session #4, May 8, 2001) with each student. She even learned more about students that she had

negatively “stereotyped” (Individual Interview #2, May 22, 2001) and was able to gain an understanding of student behavior in certain cases.

Connie concluded that the portfolio was instrumental in helping her to get to know her students. “[If] there is a tool or strategy that we can be using to help us understand the student or know the student better, I would say this has to be one of the best” (Individual Interview #2, May 22, 2001). She continued with this thought as she described her belief about the power of the portfolio in terms of getting to know students.

[You] perhaps get to know a completely different side of this person, that maybe they have volunteered with disabled children and there’s a real softness and a real sense of community that exists in that person, but an essay, chances are, isn’t going to bring that out or a test isn’t going to bring it out.

(Individual Interview #2, May 22, 2001)

Connie’s experience implementing her portfolio system taught her a lot about her teaching. Prior to this study, Connie had already made changes to the portfolio system that she had originally developed. Specifically, she added the reflection component. Connie viewed her experience implementing the portfolio in her classroom as a “self-assessment” (Group Reflective Session #1, March 27, 2001) and as a “learning experience” (Group Reflective Session #2, April 17, 2001). She admitted that she had never “done it the same two semesters” (Group Reflective Session #4, May 8, 2001). Based on her latest experience with the portfolio, Connie learned that there were certain modifications that she would like to institute next time she uses the portfolio. One change that Connie wanted to implement was to increase

the amount of time allowed to introduce the portfolio to her students. Connie stated that, when making changes, she wanted to make the process more “positive” and “streamlined” (Group Reflective Session #1, March 27, 2001) for her students. Another area that Connie wanted to improve upon was the dissemination of information to the students. Connie believed that she was not “quite sure of how it was going to take shape” (Group Reflective Session #1, March 27, 2001). As a result, she feared that her lack of understanding might have negatively affected her students’ abilities to make sense of the portfolio. Connie also expressed an interest in “having the students involved in determining what might be suitable criteria and how they would view an evaluation for this type of strategy” (Individual Interview #2, May 22, 2001). Connie was also keen to provide her students with more opportunities to share with their classmates.

Connie found herself listening (Group Reflective Session #1, March 27, 2001) to her students, even “probing” to find out what they thought in order to help her “understand.” She believed that through listening to her students she was able to discover what modifications were necessary.

If they’ve been asked to do a particular area and they’re coming back and expressing that they’re not clear on what it is that we want, or they didn’t see how this piece really connected to the portfolio process, then I think it would be rather sloppy on our part to disregard the comment. You know, you have to stand back and constructively review what is it we’ve asked them and how can we make it clearer. Because if they don’t understand it, then we’re not

going to get the quality that we're expecting, so improvement would need to be made. (Individual Interview #2, May 22, 2001)

Connie was not intimidated by change (Field Notes, Individual Interview #2, May 22, 2001). She responded to student comment and student needs.

Despite the fact that Connie had previously used the portfolio in her cooperative education classes, she did experience some anxiety. She came to the study with some knowledge about portfolios, but admitted to feeling "a little bit overwhelmed" (Individual Interview #2, May 22, 2001) by the training sessions. Other anxiety experienced by Connie surrounded her students and the curriculum.

I'd like to ensure that what we are doing with the portfolios perhaps is the best that we can be doing with the portfolios—that our students are truly gaining from it. That we are assessing, that we are evaluating in accordance with secondary school reform policies. (Individual Interview #1, February 21, 2001)

Connie was also anxious about the rubric she was creating, because she wanted it to be useful for her students. When Connie shared her portfolio experience with the other participants during group reflective sessions, she verbalized that her portfolio design was "a little bit off beat" (Group Reflective Session #2, April 17, 2001) from what the others were doing. Connie seemed concerned because her portfolio system was more "professional" as opposed to "academic" or "personal." I observed (Field Notes, Group Reflective Session #2, April 17, 2001) that this concern was characteristic of wanting to implement the portfolio "correctly." I went on to dialogue about this within the second group reflective session because I thought it

important to stress that, as teachers, we are probably more comfortable with an “academic” portfolio that demonstrates class work but that we are empowered to make decisions that suit our students and our curriculum.

*Curriculum.* Connie’s experience with the implementation of her portfolio system positively impacted the curriculum. Connie was able to use the portfolio to help her prepare for the new curriculum she was mandated to teach in the next school year. She took the time to “look at things very critically” (Individual Interview #1, February 21, 2001), and this included the development of a rubric (Appendix O), which is an element of the Ministry’s Assessment and Evaluation Policy. Connie’s experience with the portfolio led her to believe that the portfolio would “nicely adapt” (Individual Interview #1, February 21, 2001) into the assessment requirement of the Ministry. “[The portfolio] to me is a technique that can be used that very nicely fits into the mandate of formative assessment” (Individual Interview #2, May 22, 2001). Because Connie required that her students word process their portfolios, she also was able to bring in technology expectations that are an integral part of the new curriculum guidelines.

*Classroom environment.* Connie talked about the challenge of teaching in a nontraditional classroom that did not allow her to see her students on a regular basis. The portfolio facilitated the creation of a classroom environment for Connie and her students. Through the portfolio, conversation between teacher and student was initiated, and Connie learned more about her students on “a personal basis” (Individual Interview #2, May 22, 2001). As a result, Connie was able to develop and sustain a relationship with her students. The portfolio also initiated conversation

between students involved in co-operative education. The interaction served to draw students and teacher together and simulated a classroom environment. I observed (Field Notes, Individual Interview #2, May 22, 2001) that creating an environment that mirrored that of a classroom was important to Connie.

*Professional development.* Connie commented on professional development in terms of the expert and collegial support. She also referred to a colleague within the school's co-operative education department with whom she worked very closely. Finally, her participant portfolio illustrated her personal growth and learning.

Connie was supported by the expert component of the study. She was able to get my opinion on certain aspects of her portfolio system. She was especially interested in my comments regarding how I thought her portfolio system would work within the new assessment and evaluation policies. She shared her thoughts on this during our second individual interview (May 22, 2001). Connie believed that prior to her participation in this study she had "a very narrow understanding of portfolios." She had never taken the time to learn more about "other directions" that portfolios "could take." She believed that she developed an "increased awareness." She found the experience to be "valuable."

Connie actively participated in the group reflective sessions. She openly shared her own experiences and was very attentive to what the others had to say. She made comments on other participants' experiences, asked for clarification, and provided support and encouragement to these colleagues. Her suggestions were thoughtful and provided the other participants with real solutions while validating their accomplishments. Connie brought student work samples with her to a group

reflective session. This provided her colleagues with a concrete example of the portfolio system she implemented. Connie was interested in what her colleagues were doing with their portfolio systems. She fed off the ideas of others, and through the group reflective sessions came up with possible improvements for her own portfolio system. She talked about how she valued learning about other participants' various interpretations and applications of the portfolio system.

[Just] to see the creative ways in which the three of you are using them. I felt that perhaps we were too prescriptive. Your approach of having the students involved and coming up with the criteria and so on. I thought "risk-taker" but good for you. And, yeah, I could see where the students then should—not necessarily that they will—but that they should assume more ownership—since they were truly a part of the process. (Individual Interview #2, May 22, 2001)

Connie found this to be "very rewarding" (Individual Interview #2, May 22, 2001).

Connie also benefited from the experiences of the other participants.

It's been a—I suppose almost comforting in a sense too—you know when I've listened to the three of you talk and there have been some challenges with some of your students, some attitudes coming out, some mediocrity, and kids scrambling, that I realized I'm not alone in this. (Individual Interview #2, May 22, 2001)

Connie's portfolio system was designed in close consultation with another co-operative education teacher at her school. She described this relationship when she talked about almost all aspects of her portfolio system. She and her colleague presented the portfolio system to the co-operative education students together. Any



changes and improvements that were made to the portfolio system were done collaboratively. She was also supported by her contact with other co-operative education teachers from across the province. She learned from their experiences and, consequently, developed ideas for her own portfolio system.

Connie's participant portfolio reflected what she gleaned from her participation in this study. She included a section entitled "key learnings" (Participant Portfolio Reflection) and articulated 15 things that she learned from her participation in the study.

### *Heather*

*Profile.* Heather had used the portfolio in the past and was interested in improving her teaching methods with respect to this tool. Her experience with the portfolio began when a new course entitled "civics" was introduced in September 2000. Heather continued to use the portfolio the next semester with her "career studies" class. The initial interview allowed Heather to talk about her experience with the portfolio in these two classrooms.

To introduce the concept to her students, Heather used questioning to encourage her students to think about their experiences. This, Heather observed, allowed her students to have "personal input" (Individual Interview#1, February 12, 2001). Building on this, Heather introduced the concept of "life-long learning" (Individual Interview #1, February 12, 2001). She found that this was a difficult concept for her students to understand. The portfolio system that Heather implemented in these two classes allowed for student choice of artifacts based on general prerequisite topics. At this time, Heather provided her students with a rubric

as well as an explanation about the portfolio and due dates. Heather evaluated this portfolio, worth 20% of the final mark, as stipulated by her department. Heather did allow for some class time to introduce and set her expectations as well as to work on the portfolios, but she did not devote specific time every week.

In terms of reviewing student work, the first time Heather used the portfolios she collected and marked them every 2 weeks. The second time, she collected the portfolio only once at the end of the semester.

Heather found that the portfolio allowed her to get to know her students in a way that her classroom setting did not permit. She saw the portfolio as an opportunity to communicate one-on-one with her students.

Heather's previous experience with the portfolio enabled her to conclude that the portfolio was more effective as an assessment strategy. She believed that assessment of the portfolio allowed her students to "expand their learning in a different way" and this, in turn, enabled them to "get more from it" (Individual Interview #1, February 12, 2001). Heather anticipated that her students would continue to learn if they were assessed instead of graded. With this in mind, Heather believed that she would have to provide her students with "a strong motivating factor" if marks were not involved.

I don't know what kind of quality we would get if it was something we'd send them home to do and they weren't given marks for that. But as an in-class component, where they could talk about their reactions to an assignment or to an event or something that would have been done in class—would be beneficial for them, and I think they would learn to appreciate that. (Individual

Interview #1, February 12, 2001)

Heather believed that she had to find a way to motivate her students if they were not going to receive a mark for their efforts.

*Teacher attitude.* Heather's attitude was described through her motivation to participate in this study and to use the portfolio in her classroom as well as through her approach to the portfolio.

Heather was motivated to begin using portfolios in her classroom based on a significant learning experience. As part of a summer course for her own professional development, she was required to complete a daily journal. She struggled with this assignment and did not realize the true value of the exercise until she received some feedback. The experience of having another person demonstrate that they cared about what she thought and how she learned was "really powerful" (Individual Interview #1, February 12, 2001) for Heather. This experience encouraged her to learn more about the portfolio concept and to pass this on to her students.

Heather wanted to participate in this study based on her initial attempts at introducing a portfolio system in her civics and career studies classrooms. The portfolio systems that she had implemented in these two classes resulted in students who were motivated by marks. This frustrated Heather because she believed that the portfolio was "a really good opportunity for [her students] to actually learn something" (Individual Interview #1, February 12, 2001) without being dependent on marks. Heather was looking for other options in order to design a portfolio system that promoted learning. Her previous experiences with the portfolio allowed her to determine that the portfolio is more valuable as an assessment tool as opposed to an

evaluation tool. As a result, Heather was interested in designing a portfolio system that would be assessed only.

Heather was excited about the opportunity to use the portfolio to facilitate communication and interaction. Heather was pleased that her students were able to demonstrate learning through the portfolio. Heather was also happy with the classroom environment that existed when her students were working on their portfolios. Heather seemed in awe of how her students were reacting to the portfolio and was eager to share her thoughts and reactions with the other participants. Because she now focused on assessment as opposed to evaluation, Heather was interested in student reaction.

*Portfolio structure.* The portfolio structure that Heather used was explained through definition, criteria, materials, and review.

Heather defined the portfolio in a learning context. She anticipated using the portfolio as “a learning tool to transcend learning happening in history class to learning about themselves” (Group Reflective Session #1, March 27, 2001). “A portfolio allows [the students] an opportunity to reflect on their mark, their experience, and their learning” (Individual Interview #1, February 12, 2001). She believed that the portfolio forced students to “take a look at how they learned, why they learned, how they could improve” (Individual Interview #1, February 12, 2001). For Heather, the portfolio was not limited to a “collection of materials” (Individual Interview #2, May 15, 2001) but included the opportunity for students to make choices and to reflect on those choices.

When Heather initially introduced the portfolio to her history students she set up her criteria which included completeness, evidence of goals, and evidence of learning. She reviewed her expectations with her students and told them what she thought they would learn through the portfolio. She specified that the portfolio had to include written work samples and reflections that were outlined in a table of contents. Heather provided her students with a rubric that described the criteria. She required that the portfolio be “neat and organized” (Individual Interview #2, May 15, 2001). She also gave her students a “reference list” (Group Reflective Session #2, April 17, 2001) of items that needed to be included in the portfolio. All samples and reflections had to be dated when completed. Heather’s portfolio package is attached (Appendix P).

The materials included in Heather’s portfolio system focused on class work. Her students were expected to hand in 10 work samples. Six topics were specified, and 4 were chosen by the students. Both the specified and unspecified topics required that students choose appropriate work samples. One of the specified topics required students to comment on Heather’s teaching strategies, including her strengths and weaknesses. Another specified topic required that students review two tests and reflect on the relationship between their study methods and the mark they earned. Students were also expected to include a sample of something they were proud of, something they wanted to improve, and their favorite assignment. For each of the specified topics, Heather’s students were expected to reflect on four questions: “Why was the work sample chosen important to you?”, “How did this work sample influence your understanding of the topic?”, “How did this work sample help you to

grow as a life long learner?”, and “What goals did this work sample help you set or meet?” In terms of the four optional topics, Heather noted that her students included extracurricular activities, community involvement, and other nonacademic samples.

Heather’s previous experiences with the portfolio allowed her to see the importance of providing her students with regular feedback. Heather determined that students needed feedback in order to maintain focus on portfolio expectations. For Heather, the purpose of this feedback was not to tell students about the “correctness” of their work, but instead to provide them with directions, suggestions, and motivation. As a result, Heather’s portfolio review process focused on providing regular feedback. She provided her students with specific due dates when she introduced the portfolio. Heather wanted her students to know exactly when their portfolios would be reviewed so that they would be prepared. The first portfolio review occurred after the students had completed six samples with reflections. Heather then reviewed the portfolio when the next four samples were completed.

Heather’s review of the portfolio included the assessment of achievement through self-assessment, informal student-teacher conferences, and teacher-written comments (Appendix Q). Students were required to determine their level of achievement for each sample and reflection included in the portfolio. This was supported by anecdotal comments generated by the students themselves. Heather then reviewed the same sample and reflection and indicated her judgment of the level of achievement and supported her decision with written feedback. To facilitate this, Heather provided each student with an assessment handout with space for teacher’s comments and level as well as student’s comments and level for each time the

portfolio was reviewed. Having the information on one sheet allowed Heather and her students to see progression and improvement over time.

Heather used written and verbal feedback to comment on what her students had accomplished and what they still needed to work on. She provided students with verbal feedback within the first days of working on the portfolios. Heather did this purposefully because she believed that her students needed “instant gratification” (Group Reflective Session #4, May 8, 2001). This also allowed her to clarify expectations and to ensure that students were on track. Written feedback was given when the portfolios were reviewed.

Heather concluded that taking the time to review the portfolios periodically throughout the course allowed her to see improvement in student learning. Review of the portfolios allowed Heather to focus on what her students knew and honoured the fact that it was the students’ choice to accept the feedback or not. Heather also discussed, during our second individual interview (May 15, 2001), that she would like to have a more structured review process that would allow her to not only see but to measure student learning.

So, for example, if I was going to do a Prime Minister of Canada—you know, an assignment on a Prime Minister, then I would tell them that this is something—or I would work on a skill—it could be a writing skill—and then I would have them add that into their portfolio and then maybe, you know, 2 months into the course we’ll do another Prime Minister—another writing skill, similar—we’ll add that to the portfolio, and then we’ll look at what they would have learned. So the first Prime Minister will be writing say a paragraph, and

we'll assess that paragraph. And then we'll get back to another one, and then, there; I have some measurable learning.

Heather was pleased with the success of reviewing her students' portfolios through assessment. She believed that the marks would have taken away from the student experience and would have discouraged them. Her experience allowed her to focus instead on the thinking process.

*Purpose of the portfolio.* Heather articulated the purposes of her portfolio from the onset: first, to focus on assessment; second, to foster reflection; third, to nurture learning; and fourth, to integrate academics. In summary, Heather's goal was to promote students' learning through reflecting on samples related to history class.

The purpose of Heather's portfolio system was to have her students reflect on work based on history class material and to determine the reasons why each sample was included. The goal of this process was to promote individual learning. This process was then assessed in order to promote growth in each student. Assessment and learning were directly linked. Heather reflected on this in her participant portfolio:

When a student can tell the teacher that they learned through reflecting on their past work it becomes much more valuable than receiving a mark on a test where the student is left with the impression of what they did not learn.

Heather viewed the assessment as a process that allowed her students the opportunity to assess themselves, to learn from the process, and to grow because of the process.



Reflection was a key purpose of Heather's portfolio system. Heather believed that the reflection process allowed her students to understand the learning process and to use that understanding to grow as learners.

So I really think that the portfolio works for a long-term effect. Where they have to go back and take the time and reassess what they did—not only just assess the results of what happened—but how did they actually get to that result. (Group Reflective Session #2, April 17, 2001)

When her students went through this process, they were able to see what they needed to change in order to improve. The reflections allowed Heather to view student learning as it happened.

Heather believed that providing students with the opportunity to look back at work was beneficial to both the students and the teacher. She discussed this during the fourth group reflective session (May 8, 2001).

One purpose was to get the students to look back at the work they would have done, which often isn't done in class. You give an assignment, you take it up, and then it is kind of put aside—so it gives them a chance to look back at their work, and that was a good thing. And another purpose that it served was for me to have a role in understanding how much they actually learned. Like I said, you take up an assignment, and you assume they are all—you assume they're all correcting their papers, but it becomes difficult to really check that. So I found that it had a multipurposed role, one of which was for the students' enhancement and the teacher enhanced learning of the students.

The students benefited from taking the time to examine completed work and, through this, developed an understanding of the material and of the learning process itself.

Heather better understood her students' learning processes.

By assessing her students' portfolios, Heather was able to see student achievement by gaining a view of the "big picture" (Group Reflective Session #4, May 8, 2001). Heather described this as the process that each student goes through as they develop understanding that results in learning. She reflected on this in her participant portfolio:

In essence the portfolio is teaching the students to think in a different way.

Remembering is not the key to success, understanding is. If students can look back at the end of the unit and see the master plan, which teachers are too protective of, then they have succeeded in learning.

For Heather, the portfolio was a demonstration of this learning process. She did wonder about her ability to grasp the extent of student learning.

I can't really measure if they really got it. And that's really hard. Like I can measure from what they say and my interaction with them, but I think being so new and just spending a little bit of time on the portfolio, they might not realize that learning until later. Like at exam time, for example, when they think about going over everything, then they might recall. I don't know how immediate that learning is. I find that kind of a little bit hard to measure. I'd like to think that they saw it as a learning experience but it's hard to measure to extend their learning. (Individual Interview #2, May 15, 2001)

Heather expressed that she would like to provide, in the future, more “skill-based opportunities” (Individual Interview #2, May 15, 2001) for her students. She would definitely assess the portfolio again, but would structure it more formally in order to measure their learning.

I would use it as an assessment tool. As I mentioned, I would—I would make it more inclusive of skills that I would like them to have by a certain time so I can measure their learning and the students can see learning occur.

(Individual Interview #2, May 15, 2001)

Heather believed that the purpose of assessment was effective and needed to be coupled with effective measurement of student learning and skill development.

*Challenges.* Heather’s experience implementing the portfolio in her history class revealed certain challenges. These challenges included time, student reaction, materials, curriculum, and classroom.

When Heather started thinking about her portfolio system, she immediately started thinking about time. She recognized a need to provide her students with enough time to get started on their portfolios, but at the same time wanted them to assume some responsibility for completing the task. She was challenged further by the portfolio system that she had designed, because it would be assessed and not evaluated. She believed that it would be difficult to motivate students to work on the portfolio when there would not be a mark assigned. She felt obligated to commit time in class to work on the portfolios, despite the fact that she found it difficult to take away from her instructional time.

When Heather introduced the portfolio to her students, this process was interrupted and was continued during the next class. She allotted a half hour for this introductory session and found that this was not enough time. She needed about 15 minutes more in order to provide students with the opportunity to ask questions and for her to review the concepts introduced and to ensure that her students understood the portfolio concept. Heather was not distressed that she needed to spend more time introducing the portfolio concept. Instead, it was a matter of finding the time to effectively introduce the portfolio system. Heather structured her portfolio system so that students worked on one reflection sample during a half period every Thursday. This was a structured, in-class activity that required class time to complete. As the implementation process progressed, Heather found that she increased the time spent some Thursdays to a full period as opposed to a half period. “To allocate that freedom in the classroom, I did have to extend to a full period” (Individual Interview #2, May 15, 2001). She also found that time limited her ability to have group sharing sessions. She wanted to facilitate such an activity, but time did not permit this session.

Heather felt challenged by her students. She was concerned about her students’ reactions because they did not receive a mark for their efforts.

But it’s hard. Because you’re looking at them and you don’t have a mark, which we’re so accustomed to giving them; you don’t have anything of that nature that’s concrete, and they’re looking at you and you know they’re thinking, “Well, why do it then?” (Group Reflective Session #2, April 17, 2001)

In reaction to this concern, Heather created a reward system. The students who achieved a certain level based on the rubric criteria received a certificate (gold, bronze, or silver) and a reference letter.

Heather had one student who did the “bare minimum” (Group Reflective Session #2, April 17, 2001). She explained that for his artistic component, he put his name on his folder. In addition, when she looked at his first sample, she noticed that it lacked substance and detail. This student was not motivated to put any effort into the portfolio until Heather sat down with him and reviewed the rubric and explained that he would receive a reward based on the effort demonstrated.

One student did not follow the directions as outlined during the introductory session. This student completed all 10 portfolio samples and reflections after the introduction. Heather was not sure, initially, what to do with this student. She decided to challenge the student to continue to add to her portfolio because this was an exercise that this student obviously enjoyed.

What some students chose to include in their portfolios challenged Heather. She found that some chosen samples were unrelated to learning process as presented in a school environment. She wanted to find a way to ensure that her students chose samples that demonstrated an understanding of the “value” (Individual Interview #2, May 15, 2001) of the portfolio system she designed.

Heather worked with a “good” group of students. She wondered if her experience might have been different with a different group of students. She anticipated that a different class would produce different results. She noted that students need to be taught to do things and that they need the opportunity to practice.

As Heather reflected on her experience implementing the portfolio (Individual Interview #2, May 15, 2001), she explained that her students would have reacted differently had the portfolio been presented on the first day as part of the course requirements. She believed that this would have been “easier” because it would not have been a “new thing” that “throws students off.” “I just think it’s so new to the students that when introduced it has to be really carefully done so we don’t turn them off the portfolio.” She also believed that integrating the portfolio into course planning from the onset would serve to alleviate some of the time constraints.

The portfolio system that Heather designed required certain materials in order to be successful. She provided her students with folders to house their materials. In addition, to support her chosen theme, “A Handprint on My Learning” (Appendix P), Heather provided her students with finger paint so that they could put their handprints on their folder. This was an expense that Heather assumed, as well as an additional organizational task. Heather was willing to do this in order to ensure that this was a memorable experience for her students (Field Notes, Group Reflective Session #2, April 17, 2001). She also purchased glue, stickers, and tabs to support the portfolios. Heather reduced photocopying costs by providing each student with an assessment handout with space for both student and teacher comments for each review. Heather also encouraged her students to complete all portfolio work in class in order to avoid singling out students who did not have access to additional materials such as a computer. She provided her students, in class, with all the necessary materials, including a computer and printer.

Curriculum was a challenge for Heather as well. This challenge was directly linked to time. There was so much content to teach that Heather had to make decisions about how to best present the curriculum to her students. She found that she was often caught up in the day-to-day lessons and would sometimes even forget that it was “portfolio day” until her students reminded her. She was therefore challenged to present the same curriculum content but in different ways.

*Effect.* Heather’s implementation experience with the portfolio affected her students, herself, the curriculum, and the classroom environment. The effect on Heather’s students demonstrated itself through attitude, interaction, anxiety, individual representation, risk-taking, learning, control, and focus on success. The effect on Heather included anxiety, control, information about teaching, and relationship development with students. The curriculum effects were both positive and negative. The classroom environment was affected positively.

*Students.* Heather described her students’ initial reactions to the portfolio as “accepting” (Group Reflective Session #1, March 27, 2001). Heather noted that her students were in grade 10 and had likely created a portfolio in their civics or career studies classes. She explained that her students did not object to the portfolio system she designed. She believed that some of her students were “processing” (Group Reflective Session #1, March 27, 2001) the information presented. Also, some of them were working ahead in their handout package instead of listening to Heather.

Heather described her students’ reactions as “excited” (Individual Interview #2, May 15, 2001). On the other hand, “there were a few students who were not all

that excited. To them the portfolio was just another assignment to be completed” (Participant Portfolio Reflection).

Heather’s students reacted positively to the idea of their teacher writing reflections at the same time as them. They also thought it was “neat” (Group Reflective Session #1, March 27, 2001) that they had the opportunity to write a reflection on Heather’s teaching strategies.

It did take time for her students to understand that they would not receive a grade for their efforts. They were a bit “taken aback” (Individual Interview #2, May 15, 2001) initially by the fact that their portfolios would not be evaluated. Heather believed that this was because it was new to them to complete a task and not receive a grade for their efforts. Heather had to remind them, prior to the first time the portfolios were collected, that she would provide them with feedback and suggestions as opposed to a grade. Heather did note that her students continued to work on their portfolios, despite the fact that they would not be evaluated. Heather paid particular attention to the few students in her history class who were students in her civics and career studies class.

I did notice a few students who I taught before and did portfolios before who put tons of effort into it the first time—computer graphics—and now they are just handing in these written responses to kind of get it done in class. So I see that maybe—but the quality of them isn’t really necessarily that much less. They’re just not putting the extra effort into it. (Group Reflective Session #3, April 24, 2001)



Heather believed that some of the students from her former classes did not put in as much effort as they did on their previous portfolios, which were marked, but that the quality of their work was not compromised. As the implementation process continued, the focus on assessment as opposed to evaluation resulted in a shift in student perspective. They understood that the assessment process served to prepare them for the evaluation process.

As her students continued to work through their portfolios, Heather noticed that they really enjoyed the time they spent working on the portfolios. “They’re getting into it. They’re really liking the portfolio” (Group Reflective Session #2, April 17, 2001). She believed that the fact that she gave them time to work and that they were able to be creative both contributed to her students continued interest in the portfolio process. She also recognized that her students appreciated doing something different in history class. “You kind of took them out of what they would normally do, and they kind of liked that” (Group Reflective Session #2, April 17, 2001). The students especially enjoyed working on the portfolio samples that they chose. Heather gave the example of one student who was more involved in those samples that she chose herself. “And you can see the involvement there. The longer paragraphs and more intimate information is placed in that” (Group Reflective Session #3, April 24, 2001). Another reason why her students really enjoyed the portfolio was because it was not graded. Instead of the focus being on evaluation, the focus was on learning. Heather’s students appreciated that and felt less stressed because they were able to concentrate on learning.

From the onset, Heather's students were engaged in interactions with her. She discussed this during the first group reflective session (March 27, 2001). When she introduced the portfolio concept, students responded to her questioning and verbalized reasons why they should assume responsibility for their own learning and how they could proceed in order to "control, improve, or monitor their learning." Her students brought up concepts such as "ownership of their work," "choice of work samples," and "increased motivation." When they talked about the importance of goals in the learning process, they dialoged around self-esteem. When students began working on their portfolios in class, their relationship with Heather continued to develop. As she walked around the classroom, her students shared what they were working on and asked her questions when they were unsure of their direction. This allowed Heather to give her students suggestions and to focus on their accomplishments when providing advice.

Heather's students also interacted with each other through their portfolios. When they worked in class on creating the portfolio, they shared what they were including with one another. The students were very interested in what others were doing. Heather anticipated that the portfolio process would allow her students to learn about one another. This proved to be the case, because her students chatted with one another when they worked on their portfolios and they learned a lot about each other in the process of sharing ideas. Heather believed that this sharing with one another helped with her students' self-esteem.

Heather believed that interaction and the resulting relationships accounted for the need to increase time spent each Thursday on the portfolios from 30 minutes to a

full class (72 minutes). She recognized the importance of dialogue as a key component of the portfolio experience in her classroom.

If I gave them half an hour, they could still get it done, but it's just the atmosphere of the class that you don't mind giving them the whole class because they are actually talking and sharing and running around and doing things—and you know, borrowing pencil crayons. (Group Reflective Session #3, April 24, 2001)

Heather designed her portfolio system in a way that served to minimize student anxiety. Her students were relieved by the fact that they would be able to complete their portfolios in class and that they would not be evaluated. “I just think it's really neat that the kids—you would think they're all for marks, but when they have an opportunity just to do something without the obligation of marks, they're a little bit more relaxed about it” (Group Reflective Session #1, March 27, 2001). Because the portfolio was a concept that most students were still adjusting to, Heather believed that it was best to assess the portfolio; she explained why during our second individual interview (May 15, 2001):

Because it's new and because there wasn't a mark allocated to them, it didn't matter, so they did it. But I think if it was a new thing and I was expecting them to produce something that I would evaluate, then I probably would have seen a little more apprehension on their part.

The portfolio system that Heather presented to her students focused on individual representation. She rewarded their efforts with a certificate of participation. This “linked [the portfolio] a little bit to their personal life” (Group

Reflective Session #1, March 27, 2001). The portfolio also allowed students to proceed at a personal pace. Their discovery took place when they were ready for it. “So it is—it’s not just a generalized experience” (Individual Interview #2, May 15, 2001). Heather noted that as her students worked through the implementation process, they became more “active” (Group Reflective Session #2, April 17, 2001) in the process itself. From the established criteria, her students developed “personal goals” (Group Reflective Session #2, April 17, 2001). They established for themselves what they wanted to do with their individual portfolios, and they decided how important this was to them, and, therefore, how “involved” (Group Reflective Session #4, May 8, 2001) they were in this process. Heather’s students wanted the portfolio to be personalized, so they worked within her parameters to create a portfolio that reflected themselves as individuals.

The portfolio also allowed students to demonstrate what they needed some assistance with. Through the portfolio, Heather was able to “target” (Individual Interview #2, May 15, 2001) individual needs that she may not have been able to do simply through everyday classroom activities. Through feedback, Heather was able to comment on students’ individual experiences.

Heather viewed the portfolio as an opportunity for her students to take risks. “It’s taking away those parameters. Kids opening it up and saying, ‘You want to learn—figure out a way to do it. Do what you think you need to do’” (Group Reflective Session #1, March 27, 2001). As Heather’s students worked through the portfolio process, they became more comfortable with trying new things. The portfolio removed those fears of failing. “And that’s where the portfolio starts to

grow, when you kind of eliminate some of those little barriers from them” (Group Reflective Session #2, April 17, 2001). The portfolio allowed students, within the classroom context, to learn in a different way. The reflections permitted honest commentary about individuals as learners. Assessment as opposed to evaluation allowed students to explore the portfolio without fear of losing grades for spelling or grammar. Instead, students focused on their thoughts. This resulted in growth not limited by restrictions. “Students are more willing to take chances—or more willing just to write what they think, what they feel—instead of what they think I expect them to write” (Individual Interview #2, May 15, 2001). Heather believed that risk-taking allowed her students to truly learn because they were going through the process based on their personal experience as opposed to going through the process based on someone else’s expectations. For Heather, risk-taking was directly linked to responsibility and learning. She reflected on this in her participant portfolio:

I can honestly say that I believe that my classroom is an active learning environment. There are still the shy students, but there are others who have taken risks with the portfolio that they may not have taken. This tells me that the students are actively learning.

When the parameters were removed, students rose to the challenge. They figured out what needed to do in order to be successful. “They’re all able to manipulate their brains in a certain way to get to a certain conclusion” (Group Reflective Session #1, March 27, 2001).

Heather believed that the portfolio allowed students to place value in the learning process. Because the process was so individualized, students were able to

apply their learning methods, and this was valuable to them. Heather was able to understand what individual students had learned through what they chose to include in their portfolios and through their reflections. One student reflected on a low test score and demonstrated that she had learned that she needed to develop a study method and to spend time preparing for the next test. Heather valued that the portfolio allowed her students to figure out what they needed to do in order to do better and to comment on this through the reflection process. Furthermore, opportunities for reflection existed throughout the course as opposed to only at the end when students were stressed getting ready for exams. Heather believed that this all helped her students to focus in on the “big picture” (Group Reflective Session #4, May 8, 2001). This allowed students to understand as well as recall content, which resulted in learning. Heather admitted that a demonstration of this learning might not culminate until the final exam. Therefore, the learning was not always immediate. Instead, it manifested itself at a later date, which was not always evident through the portfolio process.

Heather’s students were able to assume control within the portfolio process. Heather involved her students from the onset in discussions surrounding the portfolio and the purposes it served in the classroom. Her students were allocated a specific day of each week when they worked on portfolios. She emphasized for them that this was their time and they could think about how they wanted to use that time. Heather consciously avoided a “typical teaching scenario” (Group Reflective Session #1, March 27, 2001) when it was time to work on portfolios. She wanted her students to be in control. Heather’s students were also aware of when and what needed to be

handed in to her. They were responsible for creating their folders that housed their portfolio materials. As the implementation process continued, Heather's students used the parameters established from the onset in order to create their portfolios. They were engaged in choosing samples, organizing and dating them, self-assessing their work, and recording personal comments.

The portfolio allowed students to focus on success. Heather offered "positive" and "constructive" feedback in that order (Group Reflective Session #4, May 8, 2001). Her students were congratulated on what they had accomplished prior to being given any suggestions for improvement.

I have made it common practice to always start off a comment on a positive note then add the constructive criticism. This is very important in that if the comment begins with a negative note, then, chances are, the student will not read it all (Participant Portfolio Reflection).

*Teacher.* As Heather planned the implementation of her portfolio system, she clearly believed that assessment was the focus of her system and that this was more valuable than evaluation (Field Notes, Individual Interview #1, February 12, 2001). She was concerned, though, about removing the evaluation component. She was not sure that her students would spend time working on their portfolios at home if there were no marks connected. She feared that her students might oppose her, and this caused her to be anxious. She was sure, though, that this system would work as an in-class activity with feedback. With this in mind, Heather prepared to introduce her students to the portfolio. She was unsure about how her students would react to the portfolio, so she very carefully planned her introductory lesson (Appendix R) so that

it included student input and encouraged her students to be excited about the possibilities that the portfolio offered. As her students worked through their portfolios, Heather was concerned that her structure was a “hindrance on [her students’] creativity” (Group Reflective Session #2, April 17, 2001).

Heather maintained control over certain aspects of her portfolio system. Heather developed the theme of “handprint on my learning” for her portfolio system. She introduced the portfolio to her students and provided them with a prepared package. She did ask for student input regarding the importance of student control over learning and of goal setting in learning. These questions were deliberate and prepared by Heather. She did this in order for her students to realize how the portfolio could help them with their learning. Once the students bought into the portfolio concept, Heather defined the portfolio for them and outlined her expectations and what she thought they would learn through this process. She provided her students with a calendar with working days and due dates. Heather developed certificates to reward her students’ efforts.

Throughout the implementation process, Heather noticed that her students looked to her for direction. They completed tasks because that was what she expected of them. She realized that her level of organization affected her students’ level of organization. During our second individual interview (May 15, 2001), Heather admitted that the portfolio was an “evolving process” and that the students get “better” at working with the portfolio as teachers get “better” at “producing it for them.” She seemed to feel a responsibility to help her students realize the value of the learning process (Field Notes, Individual Interview #2, May 15, 2001). She



supported her students as they worked on their portfolios through time, feedback, and dialogue.

The portfolio allowed Heather to relinquish some of the control that she was accustomed to in class. She admittedly struggled with this, and her honesty enabled the rest of us to clearly understand this struggle (Field Notes, Group Reflective Session #1, March 27, 2001). She described that, as a teacher, she found it difficult to allow students to engage in a group discussion when she noticed that it was not going as she would have planned. She found it difficult to “step back” (Group Reflective Session #1, March 27, 2001). She believed that if the right answers were forced on students, they did not “appreciate” (Group Reflective Session #1, March 27, 2001) them and did not understand the significance of that right answer as it related to their learning. In our second individual interview (May 15, 2001), she talked about “taking away some of those barriers, parameters” and allowing for “free growth learning” without “restrictions.”

Heather did not want the portfolio to become a teacher-centered activity. In fact, in the first group reflective session (March 27, 2001) she described the portfolio as a tool that made her job easier because it allowed her students to “manipulate their own learning” and enabled her to become a “mentor.”

Heather realized the importance of being flexible as she reflected on her experience with the portfolio.

Them showing me that they find it a valuable tool made it very easy for me to say, “Okay, fine. That could be changed.” So I didn’t have a problem changing things that I felt were adding to the portfolio because I do believe

that it's a good—a very valuable assessment tool. (Individual Interview #2, May 15, 2001)

As Heather reflected on her experience implementing the portfolio, she remarked that she was not at all intimidated by changing the system and process as it evolved.

As Heather thought about the six portfolio topics that she prescribed to her students, she believed that this was not necessary. She believed that her students would have responded better to more choice and that they probably would have come up with similar topics on their own.

As Heather worked through the implementation process, she gleaned information about her teaching. The portfolio system that Heather designed allowed for students to include information about their personal lives. Heather believed that she probably should have done more to link the portfolio to her students' personal lives.

Heather also learned that her students did struggle with some of the terminology related to the portfolio system she designed and introduced to them. For example, Heather noticed that her students were unsure of the concept of “life-long learner” (Individual Interview #1, February 12, 2001). She realized that she had to spend some time with her students explaining this concept and how this related to her expectations. “And I probably will rephrase it next time around. ‘How is this important for you 5 years from now?’ I think they would get that a little better than the term ‘life-long learner’” (Group Reflective Session #2, April 17, 2001).

Heather believed that the portfolio allowed her to learn what her students knew and what they still needed to work on. She found that the portfolio allowed her

to “catch” (Group Reflective Session #1, March 27, 2001) any problems before a demonstration or a test. “I realize that I can really target whether or not my students are learning. Like they might put up a good show that it looks like they’re learning, but the portfolio allows me to really see if that happened” (Group Reflective Session #4, May 8, 2001). Specifically, students’ reflections provided Heather with this information.

The portfolio played a role in understanding how students learn, and this, in turn, changed Heather as a teacher. She realized this through their reflections.

I think—and as a teacher I started to realize that it’s not what they’re reflecting upon, it’s how thoughtful the reflections are. So that’s part of the role where I found myself changing the way I teach things, because I realized a majority of students didn’t actually get the concept, so probably it was a flaw on my part. Or targeting certain student weaknesses to make sure they do understand. So that’s how it helped me. (Group Reflective Session #4, May 8, 2001)

Heather used the portfolio system to directly ask her students to comment on her teaching. This question allowed Heather to relinquish control and to learn more about her teaching. By asking her students to comment on teaching strategies, including strengths and weaknesses, Heather was able to learn more about how her students perceived her as a teacher. I noticed that Heather used this to develop a connection between teacher and student through the portfolio (Field Notes, Group Reflective Session #4, May 8, 2001). The portfolio played a role in understanding how students learn, and this, in turn, changed Heather as a teacher.

Heather realized that the portfolio enabled her to organize her students' skills and to help her students assess their own learning. She shared these thoughts with me during our second individual interview (May 15, 2001). The portfolio enabled Heather to work on individual problems within a positive context as opposed to "involving the negative tone that a mark might have."

I find by putting the parameters by always marking something—you know, pointing out student weaknesses—they're obviously not going to participate in an environment like that.

Heather also learned that she often excluded her students from the "big picture" (Group Reflective Session #4, May 8, 2001). She said that as a teacher she is aware of the "master plan" and that she often left her students to "figure it out." She believed that if she provided her students with this information it would positively affect their learning. This realization affected Heather's teaching. She believed the experience with the portfolio to be "as much of a learning experience for me as it is for my students." She was able to learn to teach more effectively through reacting to her students' needs.

Heather discussed relationship development with students as an effect of the portfolio. She identified one of the purposes of her portfolio as the opportunity to get to know her students.

I think it's that connection that you make with the students through the portfolio. They become much more comfortable. You're not just their history teacher but you are allowing them to listen to music, which is a no-no in the classroom-like, you know that, faux pas. You're bringing in finger paint,

you're talking about things that no other teacher would know. Just some of these really personal things come out. (Group Reflective Session #2, April 17, 2001)

Heather learned a lot about her students through the portfolio. She believed that she was able to get to know her students "in a different way." Heather used glitter pens and personal comments when she reviewed her students' portfolios. She did this to nurture her relationship with each student (Field Notes, Group Reflective Session #4, May 8, 2001). This resulted in more informal dialogue between teacher and student.

But for me it's really—it's been a valuable tool in learning about the students and how they think—which makes it easier then to address some of their personal issues when you're teaching them. (Individual Interview #2, May 15, 2002)

*Curriculum.* Heather's portfolio system resulted in both negative and positive effects on the curriculum. As mentioned earlier, time was a challenge for Heather. Keeping her schedule of working on the portfolio once a week meant that she had to set some things aside. She had to examine the curriculum and make decisions about how to include the numerous expectations outlined.

So I'm finding time an issue, but I am finding it valuable at the same time, and I think if it is valuable and it's a learning experience for almost the entire class is really into this, then that's got to be good enough to put a couple of things on the side. (Group Reflective Session #3, April 24, 2001)

Heather was positively affected by the changes in the way she delivered the curriculum. She was able to connect the portfolio directly to her course work. Her

students used their portfolios to reflect on course work that had been completed, handed in, and evaluated. This was positive because it allowed students to look back on the curricular concepts and “relearn” or “reassess” their work (Group Reflective Session #3, April 24, 2001). Heather found, though, that she did not use the portfolio to explore new curricular concepts. When she reflected back on the implementation process in her classroom, she discussed that the portfolio does not have to be “an extra assignment” (Individual Interview #2, May 15, 2001), instead, it can be inclusive of course work. She believed it could serve a “dual purpose” (Individual Interview #2, May 15, 2001) for her. First, it was an assessment tool, and second, as a part of the curriculum.

Heather explained that the portfolio did not prevent her from completing the course requirements as outlined in the Curriculum Policy Document. Instead, she was challenged to explore different ways of teaching the course content.

The content gets done, but perhaps the way I was going to do the content—so maybe we’re not doing the diary assignment, maybe we’re just going to be talking about it. Or you change your lesson—learning the same information but in a different way. (Group Reflective Session #3, April 24, 2001)

Heather created more meaningful tasks for her students. She talked about this during our fourth group reflective session (May 8, 2001). Through the portfolio, Heather realized that some of her assignments were “useless” with respect to their set-up. She reworked her assignments so that they encouraged student learning.

Because I've had to rethink the assignment, and by doing that I think I've made them better assignments—and more student centered. Instead of content centered all the time. Like content's good, but now they're actually learning. Prior to this realization, Heather had her students complete many assignments that did not have a "specific task." The purpose of these assignments was not evident. As a result of this realization, Heather took the time to create "valuable assignments." This meant that assignments were directly linked to the curriculum expectations and represented day-to-day classroom activities.

Heather also realized the importance of including her students in the process of interpreting the curriculum. She dialogued with her students about the purpose of the units within the context of the entire course in order for them to understand what exactly was expected of them and why certain tasks and activities were done.

*Classroom environment.* The portfolio contributed to a positive classroom environment both while students worked on portfolios every Thursday as well as throughout the history course.

From the onset, Heather explained to her students that the portfolio time was theirs. It was a time for them to "learn and grow" (Group Reflective Session #1, March 27, 2001). As her students were involved in creating the folders that would house their portfolios, Heather was struck by students' positive response and corresponding change of tone within the classroom. The opportunity for students to create and to do "art in history class" (Group Reflective Session #2, April 17, 2001) resulted in a different classroom atmosphere. Heather contributed to this by allowing students to listen to music while they worked on their portfolios. She attempted to

create an atmosphere that was “completely different from what it would be like in class” (Group Reflective Session #2, April 17, 2001):

I ended up bringing in a radio, for a few of the sessions anyway—listening to music, socializing, walking around. So it was almost a “free for all” period where they were doing their work but still free to do other things.

Heather noticed that the dialogue that began during the Thursday portfolio sessions continued outside of this time. For example, a student brought in a picture that she thought she might like to include in her portfolio. This was not a portfolio day, but the discussion occurred. Also, a “joke” about a student’s artwork continued to be brought up in class. “It’s not a bad joke, but just this whole thing, and then it’s brought the class together where perhaps it never would have before” (Group Reflective Session #2, April 17, 2001). This resulted in laughter and student involvement.

When Heather reflected (Individual Interview #2, May 15, 2001) on the environment created in her classroom by the portfolio, she described it as “a little more relaxed.” She witnessed her students working within “a set criteria” but using that time in a way that they chose. They completed tasks that they chose. They were not required to concentrate in a way that they usually did in history class. Instead, they worked through their portfolios in individual ways.



*Professional development.* Heather discussed professional development in terms of the support provided to her by both the expert and the colleague group. Her participant portfolio also provided insight into how the experience affected her professionally.

As Heather discussed her plans to implement the portfolio in her classroom during our first individual interview (February 12, 2001), she commented that she drew comfort from knowing that other teachers were also experiencing the same process. “It makes me feel that I’m not the only one doing it.” Because this was part of the new curriculum, Heather was assured that other teachers were “incorporating this into their classrooms.” She felt that she was not the only one “struggling with trying to motivate the students to do this.”

Heather was actively involved in the group sessions as both a contributor and a listener (Field Notes). She readily shared the details of her experience with the other participants. She provided details about her perceptions of her students’ experience as well as her own thoughts and beliefs as she went through the implementation process. She brought in samples of student work to share with the group and was eager to share these with the others. She related to what the other participants were sharing. She was able to understand how her experience related to the other participants’ experiences.

I think one thing that we did similarly a little bit—like I stressed it on learning perhaps because I want to stick it into history, and you stressed it on learning about themselves without any parameters, there are no limits. (Group Reflective Session #1, March 27, 2001)

Heather's response to her colleagues' experiences included adding her own thoughts and opinions. This participation was for the purposes of working out her own ideas and to give suggestions to help her colleagues. She never hesitated to seek clarification or advice from the other participants (Field Notes). At one point, she responded to a group member's frustration by describing a similar experience followed by concrete ideas about how to address the situation. She validated the experiences of others by responding to what her colleagues expressed. She provided her opinions in order to help clarify their experiences. When Phyllis was concerned about her "selfish" (Group Reflective Session #4, May 8, 2001) students, Heather expressed her opinion. "Well, I would tend to think the age group, but at the same time you're dealing with self-esteem issues and all those things where it is a little bit touchy." She also suggested that Phyllis's students might never have had the opportunity to think of others instead of themselves. She congratulated all participants on their efforts and accomplishments. She was inspired by the fact that Phyllis's students had a genuine opportunity to practice and make mistakes that did not count for grades, in preparation for an evaluation. She encouraged the other participants when they doubted their progress. She encouraged them to take "baby steps" (Group Reflective Session #4, May 8, 2001). Heather recognized that each participant's experience was unique.

When Heather was asked to talk about how participation in the study affected her use of the portfolio in her classroom, she focused on both "expert" and "learning" groups.

I feel responsible to do a good job. And I also feel that because it was not just myself involved, ideas could be bounced back and forth—portfolios are not that widely used yet. So having a concentration of people who are skilled in understanding in what a portfolio's purpose is and still learning about it and how students react to it but having—if you can use the term “expert” group—as well as a learning group, that is was definitely positive always bouncing ideas back and forth. And always in the back of my mind when I'm planning it, when I'm talking with my students, not just doing the portfolio for the sake of doing it but trying analyze myself how it actually works in the classroom, and I think that's been really valuable. (Individual Interview #2, May 15, 2001)

While her students worked on their portfolios, Heather used some of that time to reflect on what was happening in her classroom as a result of the portfolio. Heather admitted that her thoughts surrounding the portfolio had “completely changed” (Group Reflective Session #4, May 8, 2001) from the time she first introduced the portfolio to her civics students to her present use of the portfolio with her history students. She expressed that she had a positive experience implementing the portfolio in her grade 10 history classroom. She described the portfolio as a “valuable tool” (Individual Interview #1, February 21, 2001) despite the challenges she encountered. She also stated that she would like to include “more skill-based opportunities” (Individual Interview #2, May 15, 2001) for her students. She anticipated that she would “accept [the portfolio] in any class” (Individual Interview #2, May 15, 2001). “One reason is the students are familiar with it, and I think it's valuable. And if they are already familiar with it, then it should be used in all our

classes.” Heather stated that students needed to be familiarized with the value of the portfolio. She concluded that evaluation takes away from the learning.

And I think in all cases I would use it as an assessment tool. As I mentioned, I would—I would make it more inclusive of skills that I would like them to have by a certain time so I can measure their learning and the students can see learning occur. (Individual Interview #2, May 15, 2001)

*Krista*

*Profile.* My experience with the portfolio began when I was introduced to the concept during preservice training in 1994-1995. Though I did not receive a lot of instruction on the topic, this experience outlined for me possible portfolio uses.

I implemented the portfolio while working with French classes, grades 9 through 12, in my first year of teaching. This initial attempt at using the portfolios was not successful because I did not have a good understanding of what a portfolio was. I gave each student a file folder, had them put their name on it, and instructed them to place all evaluated work in the folder. The process did not involve any reflection; the portfolio was simply used to store their completed work. “I think that’s a mistake that I made the first time, where it was just a collection and there was no thought behind the collection” (Individual Interview #1, February 2, 2001). In addition, I did not understand the value of involving students in the process or of taking the time to effectively implement the portfolio. This experience taught me about what to do differently the next time.

When I moved to Ontario in 1995, I started to hear more and more about portfolios. When the new curriculum was introduced in 1999, mandated assessment

and evaluation practices as outlined by the Ontario Ministry of Education and Training in *Program Planning and Assessment* (1999b) needed to be “varied,” “administered over a period of time,” and “appropriate for the learning activities used, the purposes of instruction, and the needs and experiences of the students.” In addition, they needed to “ensure that each student is given clear directions for improvement,” “provide opportunities for students to demonstrate the full range of their learning,” “promote students’ ability to assess their own learning and to set specific goals,” and “include the use of samples of students’ work that provide evidence of their achievement.” As a result, I realized that I needed to think more about the portfolio and how it could be used in my classroom.

I attempted to use the portfolio twice again. I first used it with my OAC French class in the spring of 2000 and again with my grade 10 civics class in the fall of 2000. With these classes, I incorporated what I had learned from my first portfolio experience. I realized that I needed to start small. In addition, I collected the students’ portfolios regularly. For example, in the civics class, I collected the portfolios four times over 8 weeks, with students being expected to provide two work samples and a reflection every 2 weeks. I took the time to explain the portfolio concept and what was expected from them. I also provided the students with class time to work on their portfolios. These portfolio systems provided students with the opportunity to make choices about what materials they included and afforded them the opportunity to be creative. These portfolios were evaluated and were part of the final grade in each course.

Because I wanted to continue to explore the portfolio, I decided to develop a study that would help me to understand the experience of 4 teachers implementing the portfolio in their secondary school classrooms. As part of my participation in this study, I assumed the role of one of the participants.

*Teacher attitude.* My attitude towards the portfolio can be characterized by my motivation to design and conduct this study as well as my desire to use the portfolio again in my classroom. My attitude towards the portfolio both before and during the implementation of this project positively affected this experience.

My motivation for becoming involved in this study initiated as a result of my interest in understanding the portfolio as an assessment and learning strategy. I wanted to create a portfolio system that was not evaluated and that involved students in all aspects of the process. Second, I wanted to be involved with other teachers as they implemented the portfolio. I wanted to provide training and support for myself and other participants that would enable us to create a portfolio system that met the purposes of our curriculum and the needs of our students.

Prior to beginning the study, I spent a lot of time researching and preparing. I was intrigued by the experiences I read about, but was disappointed about how little secondary school research was available. I was prepared to share what I had learned through the training sessions. I organized a two-part training session that involved all 4 participants in order to prepare them for portfolio implementation. I believed that it was important for teachers to be a positive role model in terms of using the portfolio. With an understanding of the portfolio concept, I believed that we could go in with confidence and be open to learning while maintaining a clear understanding of the

path our students would trace. Because I was the “expert” as well as a participant, I came to every session prepared to lead but also to learn.

In terms of my own classroom, I wanted to introduce a portfolio system that would be assessed and not evaluated. I had learned through my literature review that the portfolio can be an effective assessment strategy, as students are not confined by trying to provide the teacher with “what he or she wants” and therefore, may be willing to take risks. I was a little worried about whether or not my students would take the portfolio seriously and put forth the effort required knowing that they would not receive a grade for their efforts. I was determined, though, to create such a portfolio system because I believed that there was too much focus on grades and this took away from learning.

When a kid gets an assignment back, the first thing they look at is the mark.

They don’t look at any of the comments which oftentimes can help to focus their learning. And with this, I think without putting the mark on it, they’re going to be forced to look at the comments only and think about, “How can I improve next time?” (Individual Interview #1, February 2, 2001)

In addition, with an activity such as the portfolio, it was easy for me as the teacher to interpret something differently from what the students intended. I believed that this should not affect students’ marks. My students needed to know that there was more than one answer. Through this, I was confident that I would encourage my students to interpret, apply, and research.

As I thought about the portfolio system that I wanted to introduce to my students, I acknowledged that all students were capable of successfully creating a

portfolio. I had to effectively introduce and instruct my students in this concept. Working with three other teachers helped me to develop this strategy.

When I introduced the portfolio to my students, I was excited to hear that most of my students had completed portfolios in grade 8. I had not anticipated this, and it was a nice surprise. As I involved my students in a discussion about their goals for French class, I was motivated by their responses and by the fact that they could see a link between their goals for French class and their portfolios. I was also motivated by student participation in the development of the portfolio criteria and rubric. They willingly participated in the development of both.

As my students started to create their portfolios, I was impressed by the creativity expressed through the containers they created to house their portfolios. Their ability to express and describe the portfolio criteria was rewarding. They were also successful when applying these criteria to peer assessment. As my students worked on their portfolios, I maintained a positive attitude about how the process was unfolding in the class. I believed that the benefits associated with the portfolio outweighed any challenges.

*Portfolio structure.* The portfolio system that I designed was based on my understanding of the portfolio concept and how it could best meet the needs of the curriculum and my students. In order to best illustrate this, my portfolio was characterized through definition, criteria, materials, and review.

I defined the portfolio as a thoughtful collection of materials over time. I developed this definition based on research and previous portfolio experience. This emphasized that the portfolio was a collection of samples coupled with a reflection



component. I viewed the portfolio as an activity and not an assignment. My definition focused on choice including student control. As a result, I anticipated that each student would interpret and apply the portfolio guidelines in a unique fashion. I believed that the portfolio was a tool that allowed teachers a view into the students' thinking and learning processes, enabling them to showcase their life experiences.

The criteria were developed based on the purpose of the portfolio established in class with my students. We decided on three criteria which included development of communication skills, evidence of thoughtfulness, and organization.

My portfolio system mandated certain materials and also allowed for choice of materials. I required that students include samples, reflections, a table of contents, and pictures. Students were able to choose the types of samples, the format and length of their reflections, as well as the structure of the portfolio itself. I established six categories of samples; four were stipulated including "myself as a student," "myself as a son or daughter," "myself as a friend," and "myself as a member of my community." Students chose the final two categories. I did not require that they have a certain number of samples for each category. I required only that they complete one sample for the first review and two samples for each subsequent review.

I used a variety of methods to review student portfolios. The focus, though, was on providing feedback and not assigning a mark. My students and I created a rubric based on agreed upon criteria (Appendix S). This rubric enabled students to set goals in terms of what they wanted to achieve through the portfolio. Review of the students' portfolios occurred once every 2 weeks, in class.

The first portfolio review provided me with the opportunity to verify that students had started to organize their portfolios. I took some time in class to visit with each student and noted the type of container they had created to house their portfolio. They showed me their containers and explained them to me in French.

The second review involved a teacher-student conference. This conference was carried out in French. Each student was expected to prepare one sample and one reflection and to share these with me. I created a checklist based on the rubric and provided comments, including suggestions for improvement (Appendix T).

Now the thing is, because it was the first review, I wanted to make sure that I provided them with lots of comments. So after we would sit down and conference for 2 or 3 minutes, I sat down then and spent 2 or 3 more minutes writing out specific comments for feedback so they would have a lot to go on for the next time. I think it was really important for them to get that feedback—really detailed . . . so that they knew what to work on, what was working well, and what they still had to kind of spend more time on. (Group Reflective Session #2, April 17, 2001)

This second review provided information that enabled me to determine whether or not students understood the portfolio concept.

The third review was structured much the same as the second review, except it was a student self-assessment. The students used a similar checklist and provided themselves with feedback based on the established criteria (Appendix U). I visited students and provided feedback based on their articulated achievement.

The fourth portfolio review involved a peer conference. The students chose a partner to work with. Prior to beginning the conference, students had to consider how to lead a conference. They thought about dialogue, questioning, and feedback. The conference allowed students to provide feedback regarding their partners' achievements and to provide suggestions for areas of improvement. Each conference lasted about 5 minutes. After the conference, students answered three questions regarding the portfolio they had just reviewed (Appendix V).

The reviews of student portfolios included written and verbal feedback. My students appeared to appreciate the informal verbal feedback more than the written feedback.

I'm not sure that the written feedback provided as much incentive to the students as kind of my informal verbal feedback. I think that they got more out of that than me writing down a few notes on paper for them. I think that they respond better to the verbal feedback because . . . it's immediate, it's relevant, they can ask you questions right then if they don't understand what you mean, and I think the fact that you take the time out and have the 1- or 2-minute conversation with each student, they really value that. (Group Reflective Session #4, May 8, 2001)

*Purposes of the portfolio.* I identified the promotion of communication skills and increased student responsibility for learning as central to the use of the portfolio. To this end, I began to realize that the personal portfolio suited my identified purpose. I reflected on this in my participant portfolio, following the first training session.

I identified the purpose of the portfolio for this class as the promotion of

communication and student responsibility for learning. With this in mind, I started to realize that the personal portfolio better suits my identified purpose. The students would have an opportunity to paint a holistic picture of themselves and to communicate this to me using the skills they gain in class. The purpose of this portfolio system, then, evolved to include the promotion of skill development and learning, using personal reflection. I did not want my students to view the portfolio as a purely academic exercise, though, in truth, this was a component of the portfolio because they would apply their French skills. Assessment of the portfolios provided feedback to students. This process of reflection and assessment enabled students the opportunity to apply the skills and knowledge gained through the assessment process to future summative evaluation tasks.

In terms of skill development, the portfolio system I implemented focused on communication. Students developed their communication skills as they wrote reflections and as they verbalized their portfolio contents in French. Initiative and responsibility were partnered with the communication skills.

Another identified purpose of my portfolio system was learning. The portfolio was a demonstration of the learning process. I believed that there needed to be evidence of learning, not only for me as the teacher, but also for the students. The portfolio allowed them to see a definite starting and ending point and to reflect on how they arrived at that end. Each student demonstrated improvement. The process of reflecting and receiving feedback and then using that feedback to improve subsequent reflections allowed students to realize that they were learning. One aspect that developed as the students and I worked through the portfolio involved the

students learning more about themselves. The categories that guided the inclusion of portfolio contents allowed the students to realize their abilities and their potential. Specifically, students became more confident in speaking and writing French.

The portfolio provided my students with the opportunity to reflect on the samples included in their portfolios. This process of articulating their thoughts about the samples they chose to include resulted in understanding and was linked to learning. “I think the students understand more about themselves, and they understand more about, you know, the concepts that they’re learning. Understanding is definitely leading to learning” (Group Reflective Session #4, May 8, 2001).

Another purpose of the portfolio, though it was not explicitly stated, was academic success. The students were developing their communication skills, which, for a second language course, was a very academic exercise.

To write a paragraph in French for a second-language student is a huge thing. You can imagine having to look up every second word in a dictionary when you write a paragraph in English. It takes them a good 40-45 minutes to write it. So this is an academic exercise. (Group Reflective Session #2, April 17, 2001)

Assessment of the portfolio as a purpose was clearly articulated to students from the onset. The purpose of assessment involved providing feedback to students that enabled them to focus on what they knew and were able to do and on what they still needed to learn. Assessment also provided students with feedback that led into new learnings and new understandings. They were also able to identify areas for improvement that resulted in goal setting.

*Challenges.* As I began planning for this study, I anticipated certain challenges that I would face. These challenges included time, curriculum, student reaction, participant reaction, and administrative support. Throughout the implementation process, I was able to overcome those anticipated challenges, though related challenges did present.

Based on my preparation for this study, I knew that time was a challenge that most teachers encountered when using the portfolio. I was prepared for this challenge and made a commitment to spend one class period each week working on portfolios. I knew that the students might want to work on this assignment at home, but I wanted to show them that I valued this activity enough to devote a specified amount of class time to the task.

My French students were in the second year of implementation of the new curriculum. I was aware that the old curriculum was based on grades. The new curriculum moved away from grades to include assessment coupled with evaluation. “The new curriculum is moving towards providing assessment opportunities for students that will help them in terms of their evaluation with a focus on the most recent, most consistent performance” (Individual Interview #1, February 2, 2001). In addition, learning skills, which used to be included in the student grade, were no longer part of the mark that a student earned. This meant that working independently or as part of a team, organization, work habits and homework completion, and initiative needed to be a part of the learning opportunities in a classroom, but that students no longer received a grade for these types of skills. As a result, I was challenged to provide my students with opportunities to make mistakes and to take

risks with their learning. I was challenged to show them the value of certain tasks separate from a grade. I was not sure that the students were as prepared for this challenge as I was.

As I planned to introduce the portfolio system to my students, I was concerned about their reaction to the fact that their portfolios would not be evaluated. I assumed that since they were not accustomed to putting a lot of effort into an activity that was not graded, the effort might not be there if the grade were absent.

Because of my unique role within this study as researcher, expert, and colearner (Cranton, 1992), I also had a unique concern. I wanted to be sure that I created a learning opportunity for all participants. My biggest fear was that the participants would feel as if their time had been ill spent. I did not have any anxiety surrounding whether or not the portfolios “worked,” because I believed that there would be a lot to learn from the experience even if it was not successful for all participants. I wanted to be sure that I provided all participants with effective training sessions. I wanted to challenge the participants and to provide them with an experience that led to further learning. I wanted for them to take something away with them that could help them as a teacher.

If it doesn’t work out in the sense that the teachers didn’t feel it was valuable, the reasons why they felt it wasn’t valuable are absolutely part of this. They can tell us a lot about what didn’t work for them, and then I think we—I will be able to interpret that and connect that with some of the concerns that I’ve pulled out of literature. Definitely, educators have concerns about this.

(Individual Interview #1, February 2, 2001)

I did not enter the study with a fear of its not working; instead I was challenged to facilitate a network of support as the participants implemented their portfolio systems.

Finally, I knew that I needed administrative support in order to be able to implement this study. At the board level, I solicited and received support to conduct this study. At the school level, I received principal support.

I introduced the portfolio to my French students over 2 consecutive days. I did this because I was concerned that they would be unfamiliar with the portfolio and that it would be too much information to digest in one session. This decision was made in an attempt to meet the anticipated needs of my students in relation to a new concept, which resulted in a commitment of more classroom time. The introduction was time consuming, but deliberate in order for students not to feel overwhelmed. As I worked with my students, I realized the value of time. Although it was a challenge, providing the time enabled me to support my students as they created their portfolios. With no grade attached to their efforts, I showed how much I valued this exercise through class time.

Conferencing with students was also a challenge because I was not able to meet with each student on the day of the conference. This review spilled over into three other days. "I didn't get through all of the students. I had about 8 I think I have 22 students. I had about 8 left that I had to conference with on Wednesday, Thursday, Friday, here and there in the class" (Group Reflective Session #2, April 17, 2001). I overcame this challenge by providing my students with the opportunity to self-assess and to participate in peer conferencing.



As I planned for the student-teacher conference, I was also concerned about supervising the other students while I dialogued with individual students. I discovered that the students took the initiative and worked independently on their portfolios. They were talking with their classmates, but were definitely engaged in the task at hand.

My concerns about my students' reactions were not warranted. I discovered that most of my students had been introduced to the portfolio concept in grade 8 and were therefore familiar with this type of activity. I was challenged, though, by their energy level. On the first day of introduction, they were very participatory, but on the second day, they did not have as much energy. I needed to creatively motivate them through inquiry in order to garner as much response as the day before. On this day, we developed the rubric together. They were unfamiliar with the term "thoughtfulness." "Students have a hard time with that term. You know, the whole idea of metacognition, understanding how you learn something, or what you gained from an experience and how it relates to future experiences" (Individual Interview #2, May 28, 2001). As a result, I had to spend some time working with them on this so that they could be a part of creating the rubric for this criterion. Another challenge was that they combined the other two criteria, organization and communication, together in the rubric.

One challenge that I had not anticipated involved one student who did not work within the framework that I provided. This student did not come prepared to work in class on the designated portfolio work days. He did the minimum amount of work, and I believed that he was wasting his time. To add to this challenge, he did

complete his samples for the assigned review dates. I wondered if he was more comfortable working at home. I wondered also if the fact that this assignment was not being graded might have affected his motivation.

With this student, I don't think it would matter if it were worth marks, because he is just that kind of student who leaves things and leaves things—doesn't do a lot of work in class, tends to leave things to the last minute as I said, and when he does hand it in it is not really well done. So I'm not sure, you know, even if I did have a mark value placed on this, I don't think it would make a difference. (Group Reflective Session #2, April 17, 2001)

During the portfolio work sessions, this student observed quite closely the portfolio created by a girl who sat beside him. Her portfolio was very creative, and I thought this might serve to encourage him, but it did not seem to help. I contemplated, during the second group reflective session (April 17, 2001) that maybe he spent a lot of time reflecting on what he wanted to do before he actually put his thoughts on paper.

Unfortunately, by the time he reached the point of being creative, it was somewhat late to do a really good job. I was challenged to spend more time with this student in order to ensure that he understood the concept and purpose of the portfolio that he was expected to create. I was able to conclude that this student might not want to learn or that he might not be interested in the activity, but mostly that he had to work at his own pace. I did notice some improvement over the course of the semester. I realized that student attitude influenced the kind of effort they put into the portfolio. What the students put into it is what they got out of it.

As we created the rubric, I was challenged by the curriculum. I wanted to ensure that the rubric we established reflected the standards articulated by the Ministry of Education through the achievement charts. I also found that as my students worked through their portfolios, they had lots of ideas about how their portfolios would come together. I struggled to find a balance between the curriculum demands and what the students needed. Time also related to the curriculum. The time spent working on portfolios in the classroom took away from time spent working explicitly on curriculum expectations.

The administrative support I received from my principal was what I would call silent support. He approached my work in this study as something that I was in charge of. He did not assume any of the responsibility. Instead, he trusted me and allowed me to run with my ideas.

I think that, for myself, I work best in that kind of environment where I know I'm not being watched. Or I know I'm responsible for something and I can be creative and I'm not going to be checked up on—that no matter what I do, it's right. And if I think it's not working for me, I'll change it, but nobody else is going to tell me to do that. (Individual Interview #2, May 28, 2001)

This type of administrative support, I believe, provided a good model for the 4 participants in this study in terms of the empowerment.

*Effect.* The effect of the portfolio system that I developed and implemented spread across students, teacher, curriculum, classroom environment, and professional development. Each of these areas was affected in different ways. The effect on students included a focus on success, an assumption of control, attitude, increased

risk-taking, some anxiety, interaction, individual representation, and learning. The effect on me as a teacher included control, anxiety, relationship development with students, and information about teaching. Both the curriculum and the classroom environment were positively affected by the implementation of the portfolio.

*Students.* As I planned the implementation of the portfolio system with my students, I focused on my belief that every student could experience success with this activity. As I continued to reflect on this, I realized that this activity would not allow students to “fail.” This was not only because there was no grade associated with the portfolio, but also because each student determined his or her own measure of success. The portfolio also provided an outlet to demonstrate individual success. “Because I think maybe sometimes even in our own school, other teachers, other workers, administrators . . . and then parents aren’t aware of really how good our kids are” (Group Reflective Session #1, March 27, 2001). The portfolio focused on what my students could do.

Directly related to success was control. Within the portfolio system, my students were in control of content. They decided what samples to include in their portfolios, they decided what structure their reflections would assume, and they were allowed to be creative. The students developed initiative as a result of the control that they assumed over their portfolios. My students were also given specific opportunities to control the structure of the portfolio. They were involved in creating the rubric that guided each review session. They decided what level of achievement they wanted to work towards, and they described what that looked like in terms of the established criteria.

The students were responsible for their materials and bringing them to class on portfolio days. They determined what they would accomplish each day in class and decided if they needed to spend time at home preparing for the review dates. Occasionally, a couple of students did not come prepared to work on the portfolios in class. They were aware of what was expected of them, and it was their responsibility to make choices that enabled them to complete the activity.

My students also made decisions about the amount of effort that they put into their portfolios. Each student had control over this. One student spent 4 weeks working on her first sample and reflection. She chose a very difficult task, but it was something that she really wanted to do, and she worked hard at it. She worked within her own time schedule to meet a goal that she established for herself. Another student chose to rarely work in class on his portfolio. He did complete the activity, but he chose when and where he completed the work.

The control that my students had over their portfolios was genuine. This empowered my students, and they assumed responsibility for their actions. "I think because the students were involved in it from the beginning and because they really did understand what was expected of them and they were going to work towards" (Group Reflective Session #4, May 8, 2001). My students interpreted the framework that I provided for them and created a portfolio that met their individual needs.

Because it was theirs right from the beginning, they created it, they were motivated to make it work for them. It was never about what I wanted them to do. It was about what they thought they needed to do to get a Level 4 to

meet their goal, which was to be able to communicate in French. That's their goal. It's not mine. (Individual Interview #2, May 28, 2001)

I provided them with an opportunity, and they ran with it.

Because most of my students had previous exposure to the portfolio, they were comfortable with the concept of the portfolio. They were really excited about the personal portfolio. The students immediately came up with ideas for samples to include. What my students liked most about the portfolio design was that this was an activity and not an assignment. They were also motivated by the opportunity to be creative. They were pleased that I would give them feedback and that they would not be graded. As the students worked on their portfolios each week, their enthusiasm increased. Students came to class daily asking if they could work on their portfolios. They did not view the portfolio as a "tedious academic exercise" (Group Reflective Session #2, April 17, 2001).

Related to my students' attitude was risk-taking. Because these were second-language students, they were intimidated by assignments that judged their grammar. This fear would often take away from what they tried to express in French. Because grammar was not graded, it did not matter if they made mistakes. They could focus on the message that they wanted to communicate.

My students experienced some anxiety in relation to the portfolio. Though this made students uncomfortable at first, students struggled with and eventually dealt with the anxiety. The process of overcoming anxiety resulted in students who took risks. For example, when my students were involved with teacher-student and peer conferences, they were expected to speak in French. This was something that they

struggled with but that improved with practice. The structure and expectations of a conference intimidated my students initially. Excluding an evaluation component relaxed students and encouraged them to put forth more effort.

Working with others initially caused some anxiety for my students. They were nervous about presenting their portfolio a peer. I eased their anxiety by allowing them to choose their partners. I realized that the personal portfolio was a private document. My students were uncomfortable sharing information about their successes with someone new because of fear that they would be perceived as bragging. Also, if they were not as good at something, they might have felt judged.

The portfolio system facilitated interaction in the classroom. When the personal portfolio was first introduced, I engaged my students in dialogue through inquiry. They shared their goals for French class and strategies to achieve those goals. Together, we determined that one major goal was to learn to communicate in French and that responsibility was a big part of achieving this goal. This interaction continued when we created the rubric.

When the students were engaged in their portfolio work, they would often share the contents of their portfolios with other students in the class. They talked about materials that they planned to include in their portfolios.

The conferences also provided an opportunity for me to interact with my students and to provide them with feedback. My students valued the time I took to speak with them individually. In terms of the peer conferences, the students were able to learn from what their peers had to say about their work. They were motivated

when they knew they would share their work with their peers. They also received a lot of new ideas from one another.

Interaction facilitated the development of student-student and student-teacher relationships in the classroom. The students cared about one another and about me. We were able to get to know each other as people. I believed that the relationships that were fostered through the portfolio impacted on student learning. The students worked harder, they wanted to learn, and they asked a lot of questions.

The interaction that was generated in class because of the portfolio extended outside of the portfolio sessions. Many students worked on their portfolios at home. They continued to think about this activity and dialogued with parents and friends.

My students were able to represent themselves as individuals through their portfolios. From the first day that I introduced the portfolio to them, they verbalized that, based on past portfolio experiences, they appreciated when they could personalize their portfolios.

One girl said the best part of her civics portfolio in grade 10 was making her cover, because it was about her. And they found oftentimes the portfolios that they did in the past were repetitive and not creative. (Group Reflective Session #1, March 27, 2001)

This affirmed the importance of allowing students to direct their own portfolio experience. Individuality was expressed through the containers that the students chose to house their portfolios. One student, who was very athletic, organized cue cards inside a Reebok shoe box. Another student created a memory album using a



binder and page protectors. The students spent a lot of time gathering samples that represented themselves as individuals.

My students learned French as they worked through their portfolios. They asked me to proofread their reflections and to point out any mistakes they made. They wanted to know how to improve their writing skills. My students also developed the ability to articulate what they learned from the different experiences included in their portfolios. Through this, I was able to see development in terms of how the students viewed themselves through the portfolio. These developments were evidenced in the classroom on a day-to-day basis. The students gained confidence and contributed more in class and to the assignments that they completed.

I believed that the reflection component of the portfolio promoted learning. Through the reflections, my students understood more about themselves and the concepts that they were learning. This understanding led to learning. Learning was demonstrated through the portfolio process. Reflections allowed me to determine how much each student achieved.

Achievement can be demonstrated through their ability to have fun while learning French, through their ability to demonstrate enthusiasm about the activity, they are learning more about themselves by reflecting—you know, the reflection component is what is allowing me to look at how much they have achieved. (Group Reflective Session #4, May 8, 2001)

*Teacher.* As the teacher, I assumed control over certain aspects of the portfolio. I did not want this to be a teacher-centered activity, but I understood that I had a responsibility to ensure that certain components of the portfolio were present,

that students were engaged in relevant activities, and that curriculum expectations were met.

I stipulated the portfolio structure, the review and work dates, and the number of samples and reflections included in the portfolio. I decided to assess the portfolio because I believed that evaluation negated the purpose of this personal portfolio system. I did not provide my students with a handout package. We developed the package contents together, and, as this process unfolded, the students made notes in their notebooks. I photocopied the rubric and review sheets for them. I had control over how much class time students had to work on their portfolios. I was consistent with the amount of time allocated to the portfolios. I told them from the beginning that they would have one class each week, and they planned their time accordingly.

I relinquished certain control including allowing students to choose their portfolio artifacts and empowered my students in planned and purposeful ways. I involved my students from the onset and structured this involvement so that my students participated meaningfully while I still met my responsibilities as the teacher. When I introduced the portfolio to the students, I facilitated discussion that resulted in their expressing their goals for French class and articulating how they would achieve these goals. Before the introductory sessions, I considered what I knew about my students and their character to anticipate their possible answers. What they expressed became the purpose of our portfolio system. Students were also involved in the development of the portfolio criteria and rubric. I believed that I had the responsibility to ensure that the criteria reflected the expectations outlined in the Curriculum Policy Documents. I anticipated student response and worked with their

ideas to designate criteria. The rubric also required manipulation. The Ministry required that the achievement chart be honored through any rubric developed. Although my students did create a rubric, I had to work with them to finalize the language for each category.

I found that I was not strict as students worked on their portfolios. I wanted them to accomplish certain outcomes, and I had my own ideas about the process involved, but I allowed my students to make those decisions for themselves. For example, I wanted all students to speak French exclusively. Instead, I let this develop according to their comfort level. I reflected on this in my participant portfolio (April 23, 2001):

They are certainly speaking more French than when we began this activity, but still not as much as I would like. I think this is one area where comfort comes in, and I do not want to push them and turn them off of the spontaneity that they demonstrate.

Another example involved the one student who did not work effectively in class on his portfolio; I realized that he decided when and where he could be productive. My only responsibility was to provide him with the tools he needed to be successful. As long as he met the expectations, I could not control when he worked on his portfolio.

You know, you have some students who give you more of what you expected, and some will give you less. But that's part of giving up that control. If what this student needed to do to get out of this portfolio what they needed is this minimal amount of work, then fine. You have to allow them to do that.

(Individual Interview #2, May 28, 2001)

A third example involved students working with peers. When I developed the peer assessment review, I envisioned my students working with different people who provided them with fresh, new ideas. I realized, though, that my students had the responsibility to choose their partners and that this related back to their comfort levels in terms of working with peers. I could not force that on them to work with partners that I chose for them.

The implementation of this portfolio system in my classroom caused some anxiety. When I started to plan the portfolio system, I was concerned that my students might not take this activity seriously because they might have never experienced it before. This lack of understanding about the portfolio concept, I feared, would result in reduced effort. Another related source of anxiety was associated with the assessment of the portfolio. I feared that my students would refuse to complete this assignment because they did not receive a grade for their efforts.

I was anxious about relinquishing my control as a teacher. It sometimes felt like I was not doing my job when I allowed the students to assume control. When I allowed my students to create the rubric, I was taking a risk because, although I had anticipated what my students might say, I did not know for sure what they would develop. This was the first time for me, as a teacher, that I allowed my students this level of control over something that I believed to be of critical importance.

Time was also a source of stress for me. The student-teacher conferences were not relaxing because it took me 4 days to complete them. I solved this by allowing students to self- and peer assess. On review days, I wanted to visit with

each student and dialogue for at least a couple of minutes. With only 72 minutes available, I sometimes had to continue the next day. I preferred to review the students' portfolios through these individual visits. The student-teacher conferences were not a valuable experience for me or for the students because I felt stressed about time and was unable to effectively conference with students during a single portfolio session.

The portfolio also facilitated the development of student-teacher relationships. As I traveled around the room observing my students at work and providing feedback, I learned a lot about each one of them. I discovered their fears, what they really enjoyed doing, and I learned about their families. This kind of information did not reveal itself through traditional learning activities. This interaction enabled me to get to know my students on a more personal level.

The portfolio provided me with information about my teaching. It enabled me to gear my lessons and learning activities towards student interest. Through the reflection component of the portfolio, I learned that my students struggled with writing skills. In fact, one of my students asked if I could give them a lesson on how to structurally write a sentence in French. When I talked with the rest of the class about this, more than half of the class expressed the same need. Through the portfolio, I learned more about what my students needed to know. In addition, my students became more actively involved in identifying their needs.

*Curriculum.* New curriculum policy presented me with certain challenges, including the design and delivery of curriculum, assessment and evaluation changes, and curriculum content. The portfolio allowed me to overcome all of these

challenges. As a result, implementation of the portfolio in my classroom positively affected the curriculum.

The Ontario Curriculum challenged teachers to rethink the way in which they designed and delivered curriculum. Begin with expectations, determine assessment and evaluation opportunities, and then design teaching and learning strategies. The government stressed that assessment and evaluation were central to this design and delivery. My thoughts were that if assessment and evaluation drove our curriculum, then what we assessed and evaluated must be worthwhile, because our teaching and learning strategies depended on them. The portfolio, then, was an opportunity to assess learning and to link a unique teaching and learning experience for students. What they learned through the portfolio reflected the expectations of the curriculum.

The Ontario Curriculum called for assessment opportunities for students that provided them with feedback. This feedback could be based on a rubric and reflected the level of achievement outlined in the achievement chart. The portfolio allowed me to meet this curriculum requirement.

The separation of learning skills from student achievement mandated by the Ontario Curriculum risked de-emphasis of these skills in everyday classroom activities. The portfolio allowed students to develop learning skills such as initiative, even though it was no longer part of their grade.

The curriculum for a French as a second language class was prescriptive and demanding. On the surface, there did not seem to be many opportunities to introduce varied cultural aspects of the French language. The portfolio allowed me to introduce students to French culture through music. While they worked on their portfolios, I

played music by various French-Canadian artists. In addition, in attempting to “get through” the curriculum, I found that I did not always provide my students with opportunities to engage in spontaneous conversation that would develop communication skills. The portfolio encouraged students to dialogue with peers and with me, thus providing them with authentic communication practice.

Time spent on the portfolio took away from time spent on other traditional curriculum activities. I integrated the portfolio into the French curriculum by making it part of the day-to-day classroom activities. It was not an additional activity, but integrated into learning activities that represented the curriculum expectations.

Because oftentimes there are certain things within a course that aren't as important as others that we can cover more quickly or maybe we integrate it with something else instead of spending a lot of time focusing on it. And I've been able to identify a few things that maybe aren't as important so I can make the time for the portfolio. (Group Reflective Session #3, April 24, 2001)

This was a positive experience for me because I was challenged to question the course work and to focus on the concepts that I believed were most important. I used class time more effectively.

*Classroom environment.* Use of the portfolio in my French class ultimately transformed the learning environment. This transformation was a positive one.

The classroom environment that evolved through time spent working on the portfolio could be best described as comfortable. The students were comfortable within an environment that they created. This comfort was demonstrated through free

movement throughout the classroom, asking for advice, and providing suggestions regarding portfolio content. Rapport was established between me and my students and among the students themselves.

The classroom environment was often noisy during the portfolio work sessions. While students worked on their portfolios, they listened to French music. Students walked freely around the room chatting with me and their peers.

The classroom environment was ultimately positive as a result of the portfolio. The students not only enjoyed the time spent working on portfolios, but they also enjoyed French class itself. This was encouraging, because my experience with French as a second language most often involved a negative environment where students did not believe that they were learning anything of value. With the portfolios, the students believed that they were getting more out of the everyday teaching and learning strategies.

I believed that the environment was key to the success of the portfolio. The environment was shaped by the students.

If your environment is not one that allows the students to choose their ways of expressing themselves or . . . choose that kind of environment they feel most comfortable working in, then I don't think it would be as positive of an experience. (Individual Interview #2, May 28, 2001)

I let go of traditional classroom structure.

*Professional development.* My experience in terms of professional development included my experiences as a theoretical expert and as a colleague. This unique perspective allowed me to understand the importance of professional



development with respect to implementing a portfolio system in the classroom. I understood professional development as both an expert and a colleague and was aware of professionalism and environment throughout.

In preparation for the study, I carried out a literature review exploring the use of the portfolio in the secondary classroom. This information guided the design of this study. Because I had experience with the portfolio and because I had spent extensive time researching, I was able to present myself as a “theoretical expert.” Part of my literature review also examined the role of professional development. This proved useful when I designed the study.

As I readied myself for delivering the professional development sessions, I considered that people who understand what a portfolio is often assumed that other people understand it as well. I was also aware that much of what I knew about portfolios I learned through independent research. I believed that I needed to begin by understanding exactly what a portfolio was and how it could be used in various contexts. I also started to reflect on student involvement. I understood that teachers have clear responsibilities regarding the implementation of curriculum policy, but began to consider that students could be directly involved in how these policies are demonstrated. I wanted to ensure that the participants were knowledgeable about the portfolio concept, and I wanted them to interpret this and apply it in manners that were useful for their purposes.

My initial thoughts regarding the use of the portfolio surrounded assessment and learning. I wanted to focus on understanding the portfolio as an assessment strategy that promoted learning. While working with the 3 other teachers, I

discovered that the portfolio must meet the needs of all the individuals involved. Therefore, I understood the importance of empowering participants to make choices about their own portfolio system. I was able to see the value in gaining an understanding of the portfolio as both an assessment and as an evaluation tool within a learning context.

The training sessions were initially based on my reading of the literature, but were not finalized until after the first individual interviews. I used these interviews to help focus on what the participants already knew about portfolios and what they still needed to learn. I did not begin the study wanting to tell the participants what they had to do with the portfolio. I made the assumption however, that what I presented, they would take away and use. Instead, they built a system that met their needs, using the structure that I introduced. This was a positive outcome. I realized through this experience that there was not one specific way to design a portfolio system. I also learned that there were no definite answers to questions surrounding portfolio structures. Both depended, instead, on the needs of individuals participating in the portfolio. Just as each participant interpreted and applied the portfolio system in order to meet the needs of her classroom, I believed that each student went through that same process.

The training sessions depended on the needs of the participants, but did include some purposeful content. I wanted to present the participants with both the benefits and the challenges associated with portfolio use, based on my readings of the literature. In addition, the training sessions took place over 2 days. This allowed participants to go away from the first session and reflect on the information presented.

I believed that this reflection encouraged questioning and understanding. I believed that it was important to allow the participants to go away and think about the information and then come back to the next training session with new ideas.

Related to anxiety was the issue of control. I had in mind a process that I envisioned for this study. I knew that I wanted to initiate individual interviews, followed by two training sessions, followed by group reflective sessions, and finally individual interviews again. Once I arrived at the training sessions, I had to relinquish any control I had over the study. The participants took control and decided how the portfolios would work for them. I continued to facilitate, but the real professional development lay in the ability of all participants to articulate their experiences and their beliefs. I realized that I was not able to, nor did I want to, sit at the back of their classrooms and make sure that they did not skip a step. I had to trust my participants to do what was best for them. While I had in my mind what I believed was the best way to implement the portfolio, the best way for me was not the best way for the 3 other participants.

I think that I am definitely aware of the fact that you have to empower people to make things work for them. And part of empowering an individual is providing them with the tools, or the information in this case, that they need to make the portfolio work, but then allowing them to interpret it and to put it into their personal context. And once you do that, it becomes much more relevant, and exactly what my vision is for my students isn't going to be relevant to another person's vision for their students. (Individual Interview #2, May 28, 2001)

I believed that because I had some experience with portfolio use, I was able to relinquish this control. If I had not had any practical experience, I probably would have experienced more anxiety because I would not have gone through the process of molding theory to meet individual, including my own, needs.

When I designed this study, I wanted to be intimately involved in order to gain a thorough understanding of participants' experiences. As a result, it was crucial that I be involved in all the same processes as the other 3 participants. For this reason, I asked my supervisor to lead my initial and final individual interviews as a participant.

It was important to me that the other 3 participants viewed me as a participant as well. From the onset, I explained to them that I was a "theoretical expert" and not a "practical expert." I was there to learn from their experiences because I believed there was much to discover about the portfolio and its use in the secondary school classroom.

Participation in the group reflection sessions enabled me to learn a lot about the portfolio that I applied to my own classroom. I found myself able to relate to some of the experiences described by my colleagues. Specifically, I brought challenges to the group reflection sessions, and my colleagues provided me with suggestions. This encouraged me and enabled me to gain insight about how to address different situations. For example, Heather described how she tracked review sessions on one handout. This served to reduce photocopies and to allow students to see improvement between sessions.

When I introduced my portfolio system to my students, I followed the process outlined in the two training sessions. I believed that this provided a model that allowed my students to first understand the concept and then be involved with the development of the portfolio system.

My involvement as both “theoretical expert” and “participant” did overlap at times. I had to guide discussion, but also support my colleagues. In addition, I wanted to learn as much as possible from each experience; therefore, I actively participated in asking questions for clarification. I also believed that it was important to be honest and open regarding my thoughts about my colleagues’ experiences. This most often involved providing positive feedback and encouragement. At times, the participants did look to me for validation. I stressed that there was no right or wrong way to approach the portfolio. Participants’ questions were often answered by the shared experiences of the participants, not simply me. I did not find this practice tedious; instead, it forced me to stay focused and aware of the two roles I assumed.

As I initiated this study, I reflected on teachers struggling with the new curriculum. I anticipated that there were teachers who, despite the mandated changes, continued to teach the same things in the same manner that they always had. I also considered that some boards mandated professional development activities for all teachers. Finally, I reflected that those teachers who were getting involved voluntarily in this professional development activity were really interested in leaning to implement the curriculum creatively and effectively and would therefore “get something out of it” (Individual Interview #1, February 2, 2001). These teachers

would also be willing to share their learning with their colleagues. I knew that I and the 3 other participants were those teachers who initiated their learning.

Collaboration was important to the development of a professional learning community within our group of 4. We worked collaboratively with one another and discussed issues that were relevant to us all. From this, we were able to glean information that promoted learning as professionals. Regardless of what stage each participant was at, through collaboration, we realized that we were each reworking the portfolio framework in order to meet our needs and the needs of our students. We also realized that we asked the same questions each time we worked with the portfolio because the structure was constantly being reworked.

Throughout this professional development activity, trust was directly related to professionalism. As previously mentioned, I empowered the participants to design and implement a portfolio system that reflected their needs. The result was that we designed four varied portfolio systems based on very similar training experiences. I believed this related to our unique learning styles and how we interpreted the portfolio process.

I believe that in any collaborative team, the commitment of all members is a critical prerequisite for trust. Within this study, all the participants knew that each individual was committed to the professional development process. When a participant was ill or unable to attend a group reflective session, there was no sense of disappointment. We knew that the absent member would provide us with the information that we needed in order to understand her perspective at a later session.

Each participant openly described her experiences using her portfolio system. This sharing was so open because we cared about each other. There was a genuine interest in wanting to know how each participant was faring and in helping her overcome any challenges encountered. Participants wanted to celebrate each other's achievements. They reserved judgment. There were no feelings of comparison. Instead, there was a sharing that resulted in an enhanced learning experience for all participants. Participants were comforted because they were not alone in the process. This relaxed environment was the result of the trust that we had in one another.

The professional development environment that evolved consisted of 4 participants who were committed and who trusted one another. This trust was established based on previous collegial relationships and on the relaxed atmosphere that developed. I believed that the size of the collaborative group facilitated this environment. I concluded that it was important to start small, especially in a school where the culture is not necessarily accustomed to this type of professional development activity.

### Chapter Summary

The findings of this study provided an understanding of the experience of 4 secondary school teachers who used the portfolio in their classroom. This experience demonstrated that participants were able to develop individualized portfolio systems that allowed both students and teachers to assume control over the implementation process. In addition, participants were informed about their teaching practices, challenged to reflect on methods and strategies, and ultimately able to manipulate how they were implementing curriculum. Finally, this study revealed how a

professional development structure that included participants who were motivated, committed, and supported, facilitated a collaborative learning experience that resulted in successful portfolio implementation. In Chapter Five, these findings are reviewed in relationship to contemporary literature. Consideration is given to the effect of the portfolio on students, teachers, curriculum, and classroom environment. Effect is directly impacted by teacher attitude, portfolio structure and purpose, and the challenges that unavoidably accompany the implementation of the portfolio in a secondary classroom. The role of professional development is also specifically explored. Implications of these findings on both practice and theory are hypothesized.

Through this study, it was evident that we 4 participants shared both common and unique experiences. We were motivated to implement the portfolio in our respective classrooms because we were each challenged by the new curriculum requirements and believed that the portfolio could be used to meet both curricular and student needs. Though we each interpreted portfolio design uniquely, we did encounter similar challenges related to time, students, and materials. Despite the challenges, we were able to effectively implement the portfolio in our classrooms. We determined that the effect of portfolio implementation extended not only to students and curriculum, but that we as teachers were also affected. Throughout the study, we continued to demonstrate a positive and motivated attitude. At each individual session and at the group reflective sessions, we arrived with our question prompts, our reflective notes, and sometimes samples of student work (Field Notes).



For Phyllis, this was her first time implementing the portfolio in her classroom. She was teaching a physical education class that, through new curriculum policy, was required to incorporate an academic component into a traditionally physical activity based course. In addition, she did not have a traditional classroom setting complete with supplies needed to implement this mandated curriculum. Phyllis used the portfolio as an assessment and evaluation tool to successfully incorporate new curriculum requirements. For Connie, she was hoping to improve her existing portfolio design in preparation for the next school year when she and her students would be required to implement new curriculum policy. Connie was very knowledgeable about portfolios and clearly articulated her thoughts. Despite her knowledge, she wanted to learn more and therefore approached this study in such a way that she was open to all suggestions and was consistently assessing her thoughts and actions. She too was working within a nontraditional classroom setting. Connie developed a portfolio system that was both assessed and evaluated. Heather had clear ideas about what she wanted to do with the portfolio in her classroom. She had some previous experience using the portfolio, but wanted the focus to be more on learning as opposed to achieving grades. To this end she chose to design a portfolio system that did not include evaluation. Heather also wanted to initiate student commentary on herself as a teacher so that she could improve her teaching methods. Heather worked within a traditional classroom environment. My experience was also unique because I assumed roles as researcher, expert, and participant (Cranton, 1992). As a researcher, I wanted to understand the interactions that I observed. As an expert, I wanted to facilitate a positive professional development model that initiated growth

and learning surrounding portfolio use in the secondary school classroom. As a participant, I wanted to design and implement a portfolio system that would serve to creatively engage my students in learning French. Like Heather, I worked within a traditional classroom setting. I chose to exclusively assess my students' portfolios.

## **CHAPTER FIVE: SUMMARY, CONCLUSIONS, AND IMPLICATIONS**

### **Overview**

This research study provides an understanding of the experiences of 4 secondary school teachers who used portfolios in their classrooms. This study used a case study design. Four secondary school teachers were involved in this study. They participated in individual interviews, training sessions, group reflective sessions, and created participant portfolios. Through this, a clear understanding of the teachers' experiences was gained. Common themes related to portfolios used in this secondary school environment emerged. These themes included teacher attitude, portfolio structure, portfolio purpose, challenges, effect, and professional development. These themes were presented through narratives (Creswell, 1998). In this chapter, these findings are discussed and then reviewed in relationship to contemporary literature. How these findings contribute to both theory and practice is explored.

### **Conclusions and Discussion**

Teachers were able to individualize the portfolio structure to meet both program and students' needs. The portfolio structure enabled both teachers and students to assume control within the learning process. The portfolio affected curriculum implementation by informing teachers about their teaching practices, challenging the teachers to reflect on those practices, and enabling teachers to make changes to improve their teaching. The professional development structure fostered a collaborative learning environment that enabled the teachers to experience success.

### *Portfolio Structure*

As teachers implement the new Ontario Curriculum (1999), they are challenged to develop methods of assessment and evaluation that allow students to demonstrate achievement of expectations. Assessment and evaluation methods are not separate from the learning process; they are central to this process (OMET, 1999b). In this study, the four teachers were all motivated to use the portfolios in response to the requirements of the new Ontario Curriculum. We were able to individualize the portfolio structure to meet the needs of program and students.

Originally, portfolios were structured for use in the field of visual arts (Sweet, 1993) and then adapted by teachers for use in the classroom (Burke et al., 1994). In this study, we developed unique portfolio structures that allowed us to meet the needs of the curriculum as well as the needs of our students. Midwood and colleagues (Midwood et al., 1994) determined that the structure of a student portfolio is dependent on the identified purpose, the context, and the audience. There is no definitive way to structure a portfolio (Sweet, 1993). In this study, we developed unique portfolios that considered our individual purpose, classroom context, and students' needs.

### *Portfolio Purpose*

Sweet (1993) demonstrated that the portfolio can be adapted to any classroom context. The portfolio can be used as an assessment, an evaluation, or a learning strategy. Gardner (1994, cited in Siegel & Shaughnessy, 1994) supports the portfolio as an opportunity to provide feedback that focuses on improving learning. Some researchers, including Hebert (1998), believe that the portfolio should not be graded.

Instead, it should be assessed in order to promote learning. Butler (1997) determined that assessment of the portfolio positively impacted student learning. Lima and Snider (1997) concluded that portfolios are not as effective when used as an evaluation strategy as compared with when they are used as a strategy to assess learning. When the purpose of the portfolio is tied to accountability, though, the portfolio should be graded according to the identified performance standards (Burke et al., 1994).

The teachers in this study developed portfolio systems to meet specific purposes. Phyllis's portfolio enabled her to track student progress and to provide specific feedback through assessment. Students reflected on course work and activities in order to improve skills and to learn. These reflections helped her students to prepare for their final evaluation. Connie's portfolio enabled her students to demonstrate their skills through reflection. These reflections were assessed to provide students with feedback and ultimately evaluated in order to determine a final grade. Heather's portfolio focused on learning through reflection about course content. Assessment of the portfolio fostered this learning process. My portfolio system focused on communication skill development and student responsibility for learning. Assessments of the portfolio provided feedback to students to help them recognize what they knew, what skills they had acquired, and what skills they still needed to learn.

### *Challenges*

In this study, we were faced with certain challenges as we implemented the portfolio in our classrooms, including time, students, materials, control, and

curriculum. In each case, we were able to adapt the portfolio in order to overcome these challenges while, at the same time, honouring the needs of the program and our students.

Wolfe (1999) identified time as one reason why teachers' choose not to use the portfolio in their classrooms. Travis (1996) concurred that the time required to implement a portfolio system can be overwhelming. Gardner (1994, cited in Siegel & Shaughnessy, 1994) and Butler (1997) recognized that it is time consuming to review students' portfolios. Sweet (1993) acknowledged that teachers need time to gain an understanding of the portfolio concept. In addition, teachers require time for planning, for conferencing with other teachers, for developing teaching and learning strategies, for developing materials to support the portfolio implementation, for conferencing with students, and for reviewing students' portfolios. Phyllis was most concerned about the time that the portfolio took away from activity in her physical education classroom. She was able to overcome this challenge by using health time and chunks of time at the end of class to work on the portfolio. Connie was challenged by the time needed to introduce the portfolio concept to her students and to conference with them. She set aside 6 or 7 days at the beginning of the semester and every Monday in order to meet these time requirements. Heather and I were challenged to provide class time to work on the portfolios in order to show our students that we valued this activity.

Wolfe (1999) identified materials as a challenge with respect to using portfolios in the classroom. In addition to the materials required to create the portfolio, storage space and clerical support for photocopying and keeping track of

meetings and conferences were also identified as important issues. Here, Phyllis was challenged by the cost of portfolio materials and photocopying, as well as by storage space. Through her departmental budget, she purchased a portable filing cabinet, file folders, and name tags. Connie was concerned about the cost of materials. Her students were responsible for purchasing their own portfolio materials. In the past, she was able to offer a discount price on plastic sheet protectors. This option was not available this year. Heather was challenged to provide materials that her students could use in the classroom as they created their portfolios. She purchased these materials with her own money in order to ensure that her students had equal access to materials.

Butler (1997) documented student effort and attitude as challenges associated with using portfolios. In her study, some students did not complete their portfolios and others did not hand in sufficient work. In this study, Connie described a similar experience. Some of her students responded well to the portfolio, and others did not respond as she expected. She attributed this to the range in students' abilities.

Heather had a student who did the minimum of what was required. She used this as an opportunity to explain her rewards system in order to encourage more effort. One of my students did not work within the time provided in class, nor did he meet any of the due dates. I needed to recognize that he had to choose to do the work and that I could not force him. Phyllis was most challenged by her "activity-oriented students" who were not motivated to spend time working on their portfolios during classroom time.

### *Professional Development*

The professional development structure in this study included two training sessions where I, the “theoretical expert,” provided direction and support as we planned to implement the portfolio in our classrooms. Cranton (1992) demonstrated that an expert within a professional development activity brings content and is able to facilitate learning activities. I provided a suggested portfolio framework with a number of choices that enabled us to personalize our portfolios to meet the needs of our students and our programs.

Burke et al. (1994) stressed the importance of organizing and planning the structure of the portfolio. Sweet (1993) also recognized that time is necessary in order for teachers to understand the portfolio concept, to plan, to develop teaching and learning strategies, and to develop materials to support the implementation of the portfolio. Wolfe (1999) recognized that teachers need time to plan instruction related to curriculum expectations. Jamentz (1994) demonstrated that it is necessary for teachers to decide standards and assessment design. Collaboration, according to Elliott and Woloshyn (1997), fosters relationship development between partners that influences program success. The professional development structure developed for this study fostered a collaborative learning environment that enabled the teachers to experience success.

Teachers can effectively use assessment information to plan teaching and learning strategies through collaboration with colleagues (Jamentz, 1994). In fact, Woloshyn and Elliott (2001) determined that teachers learn most effectively from collaborating with other teachers. Sweet (1993) and Wolfe (1999) both recognized



that time is necessary for teachers to conference with colleagues. Elliott and Woloshyn (1997) concurred that time facilitates collaboration. Wolfe identified networking as a support necessary for teachers implementing the portfolio. Through teacher interviews, Wolfe discovered that this network included teachers beginning to develop the portfolio for classroom use, teachers with expertise in the area of portfolio implementation, and outside experts. These teachers discussed challenges that arose in portfolio implementation and ways to improve student portfolios, shared student work samples, discussed teaching strategies, and linked the portfolio experience to district, state, and national standards.

The benefits of collaboration in terms of learning and growth are demonstrated by Elliott and Woloshyn (1997) and Woloshyn and Elliott (2001). Questioning, sharing, and encouragement resulted from collaborative partnerships between teachers and led to risk-taking and change (Woloshyn & Elliott). When teachers worked together, the collaboration served to motivate and encourage (Elliott & Woloshyn). Teachers shared problems and worked together to brainstorm solutions (Elliott & Woloshyn). The second professional development component in this study involved group reflective sessions. As part of the group reflective sessions, all 4 teachers benefited from the opportunity to share experiences with each other. We not only gained insight about how the portfolio worked or did not work, we also provided support for each other as we implemented the portfolios. We all brought in samples of student work to share with the group. We were all attentive and concerned for one another. We provided support and encouragement and validated accomplishments. Phyllis was supported by the group and gleaned ideas and

encouragement. Connie gained ideas for improving her portfolio. She found comfort in the group reflective session because she did not feel alone in terms of the challenges she faced. Heather also felt comforted in this environment and found support for using portfolios at a time when portfolios are not widely used in secondary classrooms. She knew that the other teachers were experiencing the same process and was able to relate to those experiences. She was also inspired by the ideas and experiences of the 3 other teachers. I was also able to relate to the experiences of my colleagues. I learned from the experiences of others and was able to apply this to my own portfolio. I was able to discuss challenges I encountered, and my colleagues provided insights and suggestions based on their own experiences. With experience using the portfolio, teachers developed a commitment to the portfolio philosophy and developed strategies to cope with this new learning approach (Wolfe, 1999).

### *Effect*

*Students and teacher.* The portfolio structure enabled both teachers and students to assume control over the learning process. Teachers identified the purposes of their portfolios and they decided either to assess or evaluate those portfolios (Burke et al., 1994). Teachers looked at student work and provided feedback (Gardner, 1994, cited in Siegel & Shaughnessy, 1994). In Ontario, teachers are expected to apply achievement chart standards to student performance (OMET, 1999a).

The portfolio allowed for student control as well. Secondary school students assumed an active role in the development of the portfolio. They were involved in

classroom discussions that determined the use and criteria of the portfolio (Sweet, 1993). Initial organization of portfolio structure ensured that students understood the intended purpose and type of portfolio they created and that students effectively used the portfolio (Burke et al., 1994). The portfolio provided students with a voice through which to tell their story (Hebert, 1998). The portfolio allowed students to demonstrate their learning (Burke et al.; Guskey, 1994; Jamentz, 1994; O'Connor, 1999). Mondock (1997) discussed student self-evaluation where the students "reflect[ed] on strengths, needs, and goals that result[ed] from creating the final product over time" (p. 59). The portfolio allowed students to see personal growth (Wiedmer, 1998). Students must know the expectations, and they must determine how to demonstrate their achievement of these expectations. Lankes (1999) advocated that students be allowed to create their own portfolio template. The personal portfolio allowed students to reflect on future plans, and to determine how to achieve goals they set for themselves (Burke et al.). Students collected samples to be used as evidence (Burke et al.). Portfolios provided students with opportunities to develop knowledge and understanding through the process of collecting projects over time (Gardner, 1994, cited in Siegel & Shaughnessy, 1994). The portfolio challenged students to manipulate their knowledge, which led to understanding.

Much of the literature reviewed explored the sharing of control between teachers and students. In one study (Butler, 1997), the teacher provided a list of expectations and criteria, while students documented evidences of learning and completed journal entries. The entries were based on both student and teacher choice. The teacher was responsible for assessing the portfolios and providing feedback. In

another study (Burch, 1997), the teacher facilitated rubric construction and students verbalized content and quality expectations. Contents were selected based on class discussion and teacher's judgement. Criteria were chosen and described as a class, but the teacher ensured that the criteria were not repeated and that the focus was maintained. The teacher determined the value placed on the content and quality expectations. According to Jamentz (1994), teachers determine purpose, structure, criteria, and the review process, while students assess their own learning through reflection. Students need to understand the performance standards and must practice self-assessment.

In Hebert's study (1998), students chose pieces of work to include in their portfolio and wrote reflections, while teachers provided instruction about the nature and use of the portfolio. Wolfe (1999) explained the portfolio as an assessment strategy that assesses what students know about real-life tasks and how they respond to these real-world tasks. As an assessment strategy, the portfolio allowed teachers to meet the needs of all students and to provide the opportunity for students to take control of the process involved in the assessment of their learning (Travis, 1996). Sweet (1993) warned that students are often excluded from the assessment and evaluation of their work. They are often unaware of how their performances are being evaluated. "Portfolios can provide structure for involving students in developing and understanding criteria for good efforts, in coming to see the criteria as their own, and in applying the criteria to their own and other students' work" (Sweet, 1993, p. 2).

Sweet (1993) acknowledged that in order to effectively use the portfolio, students need clear and specific guidelines. Teachers need to initiate and structure discussions about the portfolio. Teacher control over the portfolio relates directly to their professional responsibilities. In this study, all 4 teachers determined the structure of their portfolios. For Phyllis, this was important because she wanted to ensure that her students were prepared for their final 30% evaluation which was based on the contents of their portfolios. Connie supported her portfolio requirements with a student handout package that detailed the portfolio in terms of concept, structure, purpose, importance, organization, materials to include, ownership, and assessment and evaluation dates. Connie provided her students with reflection sheets, a checklist, and a table of contents template. Heather also provided her students with a prepared package. She facilitated student discussion about the portfolio and its purpose. I stipulated the portfolio structure and the number of samples and reflections included in the portfolio. I did not provide my students with a handout package. Instead, we worked through the purpose, rubric, and criteria together, using the overhead. I photocopied the final rubric and review sheets. I wanted to ensure that the criteria reflected expectations outlined in the Curriculum Policy Documents (OMET, 1999a). For this reason, I anticipated students' responses when we discussed criteria and developed the rubric together. I did have to manipulate the language and organization of the rubric in order to ensure that it reflected the achievement charts.

Three teachers controlled how class time was allotted for portfolio work. Phyllis determined where and when students worked on the portfolios. She was able to judge from student response when students worked most effectively on portfolios

during physical education classes. Heather assigned due dates and provided one work period each week. I determined the review and work date and decided when students would work on their portfolios during class time. Connie did not have any control over when her students worked on their portfolios because she did not meet with her students on a daily basis.

Ultimately, the 4 teachers in this study did have control over the portfolio, not only because we made decisions regarding the portfolio structure and content, but also because we allowed our students to assume control. Phyllis and her students worked together to make decisions about evidence and expectations. She allowed her students to keep track of the materials in their portfolios and to choose the materials included in it. Connie's students were aware of due dates, criteria, and expectations. They completed self-assessments and were responsible for storing a "completeness" checklist. Connie's students could choose to conference with her each Monday to receive feedback. Connie's students were also able to choose the samples included in their portfolios and she encouraged creativity. Heather's students were involved in discussions that determined the purpose of the portfolio. Her students were allowed one class period per week to work independently on their portfolios. Heather's students created the folders that housed their portfolios. They chose samples, they organized these samples, they self-assessed their work, and they recorded personal comments. My students were in control of the content of their portfolios. They chose their samples and decided on the structure of their reflections. Creativity was encouraged. My students were also actively involved in determining the structure of the portfolio. They helped to create the rubric and the criteria. The students were

responsible for organizing, maintaining, and bringing their portfolios to class for work periods. In terms of effort, the students controlled the amount of effort they put into their portfolios. Despite the provision of structure, time, and feedback, the students ultimately determined how much effort they put into their portfolios.

Phyllis's students valued the opportunity to make choices within the established portfolio structure. As a result of this shared responsibility, Phyllis's students were "goal oriented" and assumed responsibility for task completion. Connie hoped that in the future her students would seek to have more input into the portfolio process. Heather did struggle with the concept of control. She wanted to relinquish a lot of the responsibility and to "step back" and allow students to go through the process of discovery instead of her providing them with the "right" direction. Heather believed her role became that of a "mentor" while the students "manipulated" their learning. I did have certain expectations for my students that I just had to let go. I wanted my students to speak French exclusively while they worked on their portfolios. This did not happen, but I had to allow the students to develop this ability within their own comfort range. I also wanted my students to work with different groups of people when they participated in peer assessment. Again, I had to allow my students to make decisions based on their comfort level. The decisions that my students made concerning their portfolios empowered them. They assumed responsibility for their actions, and they developed initiative.

*Curriculum.* The Ontario Curriculum (OMET, 1999a) challenged teachers to deliver curriculum consistent with curriculum expectations and achievement criteria developed for each secondary school course. The portfolio informs teachers about

their teaching practices, challenges them to reflect on those recognized teaching practices, and enables teachers to redesign curriculum implementation.

Martin-Kniep (1992) acknowledged that alternative assessment strategies, including the portfolio, demand a clear connection between instruction and assessment. Her study concluded that alternative assessment strategies are both a process and a product. The process enabled teachers to define what and how they would teach and assess. The product was an assessment task, such as the portfolio, that allowed students to demonstrate achievement of the identified expectations. The portfolio enabled the construction of more meaningful forms of student assessment because the focus was no longer on regurgitation of facts, but instead on affording students the opportunity to explain concepts (Butler, 1997). Assessment strategies were used to improve teaching and learning by affording teachers opportunities to gain an understanding of how standards are translated into instruction (Jamentz, 1994).

Phyllis was challenged by the new physical education curriculum because she found it to be “paper oriented” (March 27, 2001; Group Reflective Session #1, p. 7) and “academic.” She struggled to find varied ways of evaluating her students according to curriculum demands. Phyllis was initially concerned that the written work would adversely affect activity time. In response to this concern, her portfolio served as the 30% final evaluation component of the course mandated through the new Ontario Curriculum. The portfolio housed all academic work mandated in the Curriculum Policy Documents (OMET, 1999a). In addition, Phyllis was able to introduce concepts that she had not previously taken the time to explore in class, as



her previous focus was on activity. For instance, she was able to extend curriculum expectations into experiences that allowed her students to explore life-long fitness and healthy, active living.

Implementation of the portfolio in her classroom allowed Phyllis to modify her teaching. Through the portfolio, Phyllis discovered her students' skills and what skills they still needed to acquire in order to meet curriculum expectations. Phyllis also learned that her assignments needed to be connected to her final evaluation. Therefore, assignments were no longer simply handed in, marked, and set aside. Instead, they were reviewed and applied for varied purposes.

Phyllis manipulated class time to include the portfolio. Working on the portfolio did take away from activity time, but Phyllis was able to center portfolio work during health time and to dedicate time at the end of physical activity.

Connie was not directly affected by the mandated curriculum changes, as her grade 11 students would be required to meet the new curriculum expectations in the next school year and her grade 12 students the year after. Connie anticipated the curriculum changes and was beginning to modify her assessment and evaluation practices as well as her teaching and learning strategies in order to meet the needs of the new curriculum. She was challenged most by the assessment and evaluation requirements, because she believed that the levels of achievement outlined on the mandated achievement chart did not provide enough direction for her students. Implementing the portfolio with her students enabled Connie to learn about her teaching. In the future, she planned to provide more time to introduce portfolios to her students, and she wanted to change the way she delivered this information. She

also wanted to involve her students more actively in the portfolio process. Connie was able to use the portfolio to really “listen” to what her students were telling her about the portfolio process. She used this to respond to her students’ needs. Ultimately, Connie believed that this process helped her to prepare to implement the new curriculum. She developed a rubric consistent with Ministry assessment and evaluation requirements.

Heather was challenged by the history content mandated by the Curriculum Policy Documents (OMET, 1999a). She found that there was so much content to teach that she had to make decisions about how to effectively present the curriculum to her students. This involved using varied teaching/learning and assessment/evaluation strategies. She connected the portfolio directly to her course work. She was able to explore different ways of teaching the course content. Through this exploration, Heather created meaningful tasks for her students instead of “useless” assignments that were not linked to an expectation.

The portfolio allowed Heather to learn about her teaching. Heather wanted to encourage her students to include information about their personal lives. Heather was able to discern which concepts her students struggled to understand (e.g., “life-long learning”). These insights allowed her to design lessons to further her students’ understanding of such concepts. The portfolios enabled Heather to learn what her students knew and were able to do and what they still needed to learn. The portfolio allowed Heather to provide students with further learning opportunities, as needed, before an evaluation. Heather was also able to use the portfolio to understand how her students learned. This encouraged her to change the way she taught in order to

better meet her students' learning needs. Heather learned that she often excluded her students from the "big picture." This realization changed her teaching to be more inclusive of students so that they could understand what was expected of them and how tasks and activities were linked to these expectations. Heather was also able to focus on individual students and their struggles.

I was also challenged by the assessment and evaluation requirements of the new curriculum as I planned the portfolio. I wanted to ensure that my rubric reflected the Ministry requirements outlined in the achievement charts. I struggled to balance both student and curriculum needs. Time spent working on the portfolios took time away from explicitly teaching curriculum expectations. The portfolio was integrated into the day-to-day activities of the classroom. It represented learning activities reflective of Ministry requirements. I was also challenged to make decisions about how I organized and presented the course requirements. I focused on what I believed were the most important expectations and, as a result, used the class time more effectively.

The portfolio allowed me to structure teaching and learning activities around student interest. I learned, through the reflection component of the portfolio, what skills my students needed to work on and was able to structure lessons around those expectations. For me, the portfolio allowed for the assessment of student learning through a unique teaching and learning experience. I was able to use the portfolio to develop students' initiative, even though these skills are no longer measured as an achievement within the new curriculum. The new French Curriculum Policy Document (OMET, 1999a) is prescriptive and demanding. The portfolio allowed me

to meet the required expectations and to present the curriculum in a culturally inclusive manner. For instance, I was able to incorporate music and conversation into the curriculum. While students worked on their portfolios, they listened to French-Canadian musicians. They also engaged in dialogue with their peers and me.

### Implications for Theory

The professional development structure demonstrated through this study provides a model for in-school professional development activities. The literature supports that teachers need time to understand the portfolio concept (Sweet, 1993). Without the commitment of time, teachers are ill prepared to implement curriculum changes (Morey, 2001). The literature supports recognition of the needs of adult learners (Cranton, 1992). The level of support required in this study depended on teachers' experiences. All of the teachers in this study benefited from the time and expertise provided through the professional development sessions. The presence of a "theoretical expert" was necessary. The literature supports the role of the expert in an adult education environment where learners require content to support completion of tasks (Cranton, 1992). In this study, the expert structured the professional development activities based on input from participants. Though the expert facilitated the professional development activities, the participants themselves were actually in control because they determined the structure and content of the sessions.

The literature supports teacher input into the portfolio structure (Burke et al., 1994) and its instruction (Sweet, 1993; Wolfe, 1999). Professional development should be based on what teachers need to learn (Martineau, 1998). Experience is recognized as an integral aspect of adult education (Cranton, 1992; Dewey, 1938;

Martineau). Experiences shape learning, and, through reflection, change occurs (Cranton). An ideal professional development structure provides teachers with instruction regarding portfolio implementation in a classroom and then allows for teachers to design portfolio systems based on their identified needs. The participants are empowered through the professional development process. They make decisions that best meet their needs, the needs of their students, and the needs of their programs. The theoretical expert provides the content and allows for the interpretation and application of this content within the participants' personal contexts. This results in a professional development activity that is relevant to the needs of the participants and is suitable for participants with various levels of experience with portfolios.

The literature supports opportunities for teachers to conference and network with one another (Jamentz, 1994; Sweet, 1993; Wolfe, 1999). A collaborative professional development environment where teachers are able to give and receive support is ideal (Elliott & Woloshyn, 1997; Woloshyn & Elliott, 2001). Teachers are reassured by this connection (Cranton, 1992). The professional development structure in this study presented an environment that resulted in participant creativity and risk-taking. This implies collaboration supported by committed participants who trust one another. The trust is dependent on the demonstrated commitment of all participants. The professional development sessions demonstrated the care that the participants felt for one another.

It is necessary to continue to explore the nature of professional development issues as presented in this study. What are the effects of the professional development structure described here with respect to how teachers, in turn, present

and interact with students? In this study, one demonstrated outcome concerned “control.” Teachers relinquished control to students according to their comfort levels. Teachers were aware of their professional responsibilities. Teachers wanted to allow students more control over their learning process.

Maintaining participant portfolios reflected the experiences of teachers as they implemented the portfolio in their classrooms. Did this opportunity to reflect serve to meet the emotional needs of the participants, as Cranton (1992) suggests? Further research is warranted into the effects associated with the use of a participant portfolio within a professional development structure on teachers’ success with portfolio implementation.

The portfolio can be structured to serve both assessment and evaluation purposes (Butler, 1997; Gardner, 1994, cited in Siegel & Shaughnessy, 1994; Hebert, 1998). Students did not always seem as focused on grades as teachers. Students appreciated the feedback that the assessment component of the portfolio provided and focused on using the portfolio for their own purposes. This provided an interesting commentary on evaluation and the portfolio. If the assessment component was most useful to students, then the evaluation component can be considered a tool for teachers with respect to being accountable (Burke et al., 1994). When interpreting the Ontario Curriculum, teachers begin with expectations, decide on assessment and evaluation opportunities for students, and then design teaching and learning strategies (Wiggins & McTighe, 1998). What becomes central to this design is the assessment and evaluation component. The Ontario government, through the Curriculum Policy Documents (OMET, 1999a) stresses that assessment and evaluation drive the

curriculum. If assessment and evaluation are driving the curriculum, then what is assessed and evaluated must be consistent with teaching and learning strategies. The portfolio provides an opportunity to assess learning, coupled with a unique teaching and learning experience for students. What students learn through the portfolio is reflected in their grade because the evaluation component is consistent with what students have practiced.

The literature demonstrated a connection between assessment and learning (Butler, 1997; Gardner, 1994, cited in Siegel and Shaughnessy, 1994) and a connection between instruction and assessment (Martin-Kniep, 1992). Teachers believed that the portfolio leads to improved student learning. The feedback provided through assessment allowed students to focus on improving skills and filling in knowledge gaps. There is a need to focus on finding a way to quantify the learning that students experience. Assessment and evaluation of student portfolios warrants further research. It is important to understand the specific effect that assessment and evaluation has on student learning. A study that compares students whose portfolios are exclusively assessed (i.e., not graded) with students whose portfolios are exclusively evaluated (i.e., graded) would provide additional insights about the purpose and use of portfolios in the secondary school classroom.

### Implications for Practice

Student reflection was a key component within the portfolio structure. It was through reflection that teachers were able to determine what students learned. Students, though, struggled with the concept of reflecting and being thoughtful. This was perhaps because they are not often asked to reflect in secondary school. The

outcome of reflection is awareness for both teacher and student regarding what students know and what they may still need to learn. It is important that reflection be incorporated into secondary school classrooms. This skill enables an understanding of the learning process for each student. Further study into the area of student reflection could result in practical strategies for introducing and practicing this skill in the secondary school classroom.

In order to facilitate the implementation of the portfolio in the secondary school classroom, administrative support is necessary. An empowering learning environment established by the administrative leader in a school is essential for teachers to experience success using the portfolio in their classrooms. When teachers are able to work without constant supervision, they are empowered to complete their tasks creatively without the need for constant approval.

It is necessary for teachers to gain understanding about the portfolio concept and how it can be effectively used in a secondary school classroom. This requires instruction beginning in faculties of education. This should occur through both instruction and practice. Preservice teachers should receive instruction on what a portfolio is and how it can be used in the classroom. They should be encouraged to conduct research and to develop a portfolio system that they could implement in a future classroom. In addition, they should be required to develop and maintain a portfolio reflective of their course work in the faculty of education. This would enable preservice teachers to practice this tool before implementing it in their classrooms. This would provide preservice teachers with the opportunity to



understand the benefits and challenges that students experience when using the portfolio.

In order to sustain portfolio use in the secondary school classroom, teachers need to view this as worthwhile and beneficial to student learning while meeting curriculum requirements. This can be accomplished through a collaborative environment where teachers have time to share success and struggles encountered through the use of the portfolio. Because the new curriculum is prescriptive and dense, it becomes necessary for teachers to make choices about what expectations to focus on when teaching, assessing, and evaluating. The portfolio can house demonstrations of achievement of expectations without needing to devote an assignment or test to each expectation. It becomes evident that each expectation does not need to be marked, though students do have to demonstrate that they have learned these expectations. In this way, teachers are able to cover the required curriculum but do not overtax their students or themselves with constant evaluation.

Finally, teachers can benefit professionally from the portfolio structure. The Ontario College of Teachers is in the process of implementing specific requirements that require teachers to update their skills through expensive and time-consuming course work. The portfolio structure allows teachers to demonstrate abilities in those areas stipulated by the College of Teachers. This may be more effective than taking courses because it allows teachers to reflect on their experiences and what they have learned, which serves to challenge them to continuously improve. Also, the portfolio structure does not limit teachers to improving their academic and classroom skills only, but also to enhancing themselves as members of societies, communities, and

families. When teachers take care of themselves as a whole, they are more effective in the classroom.

### Overall Summary

This research study enabled an understanding of the portfolio in the secondary school classroom. The 4 teachers in this study successfully individualized the structure of the portfolio in order to meet the needs of program and their students. The portfolio structure enabled these teachers and their students to assume control in the learning process. The portfolio informed teachers, challenged them to reflect, and enabled them to redesign the way they implemented curriculum. The professional development structure enabled the teachers to experience success through a supportive and caring learning environment. The portfolio is beneficial for use in all secondary school classrooms. Students benefited from being allowed to learn in a creative way. Teachers benefited from the professional development experience. In this study, the use of the portfolio represented a worthwhile experience for both teachers and their students.

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## Appendix A

### Letter of Information

December 14, 2000

Re: Understanding the Portfolio as an Assessment Strategy

Dear Colleague,

The final component of my Master's of Education Degree requires that I complete a thesis. I plan to conduct a qualitative study to gain an understanding of secondary school teachers using the portfolio as an assessment and learning strategy. This study is important because as teachers in Ontario, we are required to rework the role of assessment and evaluation in the classroom. The portfolio is an assessment tool that can be used to successfully implement the new assessment and evaluation policies.

I am inviting you and two other teachers from your school to participate in this study. Your involvement in this study will consist of four stages:

1. Initial, individual interview, by me, the researcher, to discuss your initial perceptions of the portfolio
2. Two group training sessions, administered by the researcher to provide instruction in the purpose of, the design, and the use of the portfolio as an assessment strategy
3. Implementation of this assessment strategy in your classroom – an invitation to attend four, bi-weekly reflective sessions to share your classroom experience with the researcher and the other participants and keeping a portfolio of this experience
4. Individual interview with the researcher to explore your final experience using the portfolio as an assessment strategy

You may wish to view the attached sample interview questions prior to agreeing to participate in this study.

The time commitment involved will require approximately six, one-hour after school interview sessions and two, two-hour after school training sessions. You will be provided with a copy of your interview transcripts and any research findings. Your participation in this study is voluntary. You may choose to decline answering any of the interview questions, and you may withdraw from this study at any time without negative consequences.

All interviews will be audio taped and professionally transcribed. You will be asked to provide the researcher with your portfolio, upon completion of your involvement in the study. Your portfolio will be returned to you at the conclusion of this study. All data will be analyzed and you will be given an opportunity to review and edit all interpretations and conclusions before they are used in the thesis. The information collected, analyzed and published for and in this thesis will not identify you or your school in any way. The researcher will safely store all data collected. At the end of the study, transcripts will be shredded and audiotapes will be erased. The findings of this study, upon completion, will be made available to you and to the school board.

This study has been reviewed and has received ethics approval through the Brock University Research Ethics Board. It has also been reviewed and approved by school board. If you have any questions or concerns about your involvement in this study, please contact myself at 573-3000 (ext. 6108), Dr. Vera Woloshyn, Thesis Advisor at Brock University (688-5550 ext. 3340/4302), or the Director of Research Services at 688-5550 (ext. 4315).

I would like to thank-you for your support and participation.

Sincerely,

Krista Brodersen

## Appendix B

### Consent Form

#### Understanding the Portfolio as an Assessment Strategy

Researcher: Krista Brodersen

Thesis Advisor: Dr. Vera Woloshyn

I, \_\_\_\_\_, understand that this study in which I have agreed to participate will involve providing information regarding my experience using the portfolio as an assessment and learning strategy. I understand that the researcher will participate in the study.

I understand that I will be required to participate in six, one-hour after school interviews, two of which are individual with the researcher and four of which involve two other participants, the researcher, and myself. I understand that I will also participate in two, two-hour after school training sessions. I also understand that I am required to keep a portfolio of this experience and that this portfolio will be provided to the researcher upon completion of my involvement in this study.

I understand that the interviews will be audio taped and later professionally transcribed. I understand that I will have the opportunity to review and edit the transcripts, as well as all interpretations and conclusions drawn from the transcripts.

I understand that I reserve the right to withdraw from this research project at any time without penalty. I understand that there is no obligation to answer any questions or to participate in any aspect of this study that I consider invasive, offensive, or inappropriate. I understand that all personal data will be kept strictly confidential and that all information will be coded so that my name is not associated with my answers. I understand that only the researcher, the advisor named above, and the professional transcriber will have access to the data.

I understand that the information obtained in this study will be gathered for the purpose of writing a Master's of Education Thesis and that this will be shared with the school board.

I understand that there will be no payment for my participation.

My signature indicates that I have read and understood the information letter and that I understand that I may ask any questions before, during, or after my participation in the study. By signing this research consent form, I am indicating my free consent to participation in this research study.

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_

Thank-you for your participation. Please retain one copy of this form for future reference.

This study has been reviewed and approved by the Brock Research Ethics Board. (File # 00-106)

Feedback about the use of the data collected will be available during the month of June 2001 at the high school. An executive summary will be provided for you upon completion of the study.

I have fully explained the procedures of this study to the above volunteer.

Researcher Signature \_\_\_\_\_ Date \_\_\_\_\_



## Appendix C

### Questioning Guides for Interviews

#### Portfolios as an Assessment Strategy: Individual Interview #1

The purpose of this initial interview is to speak with the participants individually in order to understand a secondary school teacher's perception of the portfolio.

1. Could you talk to me about your experience, to date, with portfolios?
  - a. What do you think a portfolio is?
  - b. How do you think a portfolio can be used in the classroom?
  - c. How have you used the portfolio in your classroom?
  - d. Why have you used the portfolio in your classroom?
  - e. Why have you not used the portfolio in your classroom?
2. How would you describe the difference between assessment and evaluation?
  - a. How would you define assessment?
  - b. Can you give an example of an assessment strategy that you have used in your classroom?
  - c. How would you define evaluation?
  - d. Can you give an example of an evaluation strategy that you have used in your classroom?
  - e. Do you think the portfolio is more powerful as an assessment strategy or as an evaluation strategy?

## Portfolios in the Secondary School Classroom: Individual Interview #2

The purpose of this second individual interview is to understand the experience of a secondary school teacher using the portfolio in her classroom.

1. Could you describe for me your experience using the portfolio in the classroom, over the past nine weeks?
2. What purpose do you think the portfolio served in your classroom?
3. How would you describe the impact the portfolio had on your students?
  - a. How do you think the portfolio affected your students' learning?
  - b. How would you describe your students' attitude towards the portfolio?
4. Describe how the portfolio impacted on you, as a teacher.
  - a. How would you describe your attitude towards the portfolio?
5. Could you discuss your perceptions of the portfolio, as an assessment and/or evaluation strategy?

## Appendix D

### Agendas for the Training Sessions

#### Portfolios in the Secondary School Classroom: Training Session #1

The purpose of this first training session is to introduce participants to the concept of a portfolio and how to implement this strategy in their classroom.

1. What is a portfolio?
  - a. Many definitions exist
  - b. Portfolio as a thoughtful collection of materials that demonstrates learning and growth over time
2. What is the purpose of a portfolio?
  - a. Curriculum Expectations
  - b. Portfolio as an assessment strategy
  - c. Portfolio as an evaluation strategy
  - d. Portfolio as a learning strategy
3. What types of portfolios exist?
  - a. Outline the types of portfolios that exist
  - b. Outline the uses of the different types of portfolios
  - c. Determining what type of portfolio best suits your purpose
4. What is included in a portfolio?
  - a. Examples of materials that can be collected and placed in a portfolio
  - b. Show samples of student portfolios

#### Portfolios in the secondary school classroom: Training Session #2

The purpose of this second training session is to determine how the portfolio will be assessed and taught.

1. Develop the criteria
  - a. Ensure that the purpose of the portfolio corresponds with the criteria
  - b. Communication with students
2. How and when will the portfolio be reviewed?
  - a. Purpose of Review
    - i. Feedback
    - ii. Grades
  - b. Tools for Review
    - i. Rubrics
    - ii. Checklists
    - iii. Conferences
3. Teaching strategies
  - a. Review process involved in the training sessions to date
  - b. How does this translate into the classroom experience

## Appendix E

### Questioning Guides for Group Reflective Sessions

#### Portfolios: Group Reflective Session #1

The purpose of this first reflective session is to understand four secondary school teachers' experiences introducing the portfolio to their students.

1. Could you describe your experience introducing the portfolio to your class?
  - a. What was it like to introduce and explain the portfolio to your class?
  - b. What facilitated / impaired the introduction and explanation of the portfolio?
2. How would you describe your students' initial reactions to the portfolio?
  - a. How would you explain your students' reactions?
  - b. What factors may have impacted on your students' reactions?
3. What do you think you need to do over the next eight weeks to make this work in your classroom?
  - a. Describe how you will make the portfolio work in your classroom.
  - b. Do you think it will be a difficult or an easy task to make the portfolio work in your classroom?
4. What do you expect from your students over the next eight weeks?
  - a. Describe how you have communicated your expectations with your students so far.
  - b. How will you continue to communicate your expectations with your students?

## Portfolios: Group Reflective Session #2

The purpose of this second reflective session is to understand four secondary school teachers' experiences implementing the portfolio, in their classrooms.

1. Could you describe your experience implementing the portfolio into your classroom?
  - a. Describe a situation you have encountered over the past couple of weeks.
  - b. How did you deal with the situation?
  - c. Explain how the situation impacted on you and on your students.
2. How has the portfolio been working in your classroom?
  - a. What purpose does the portfolio serve in your classroom?
  - b. How is the portfolio being used in your classroom?
3. Could you describe the response to the portfolio, in your classroom?
  - a. How are the students responding to the portfolio?
  - b. How are you responding to the portfolio?

### Portfolios: Group Reflective Session #3

The purpose of this third reflective session is to understand four secondary school teachers' perceptions of the effectiveness of the portfolio, in their classroom.

1. Could you describe your experience implementing the portfolio into your classroom?
  - a. Describe your experience as you support your students as they create their portfolios.
  - b. How are you impacted by the implementation of the portfolio in your classroom?
2. Could you talk about your perception of any effects the portfolio has had on your students?
  - a. Describe how the portfolio has affected your students.
  - b. How are your students reacting to the portfolio?
3. Is the portfolio working in your classroom?
  - a. Describe how your students' portfolios look.
  - b. Explain any changes you might initiate in your classroom over the next couple of weeks.

### Portfolios: Group Reflective Session #4

The purpose of this fourth reflective session is to understand four secondary school teachers' perceptions of the portfolio.

1. Based on your experience implementing the portfolio in your classroom, what purpose do you think is served by the portfolio?
  - a. Describe how the portfolio has measured your students' achievements.
  - b. Describe how the portfolio has impacted on your students' reflections.
  - c. Describe how the portfolio has affected your students' learning skills?
2. Describe your impressions about the method you used to provide feedback to students.
  - a. How do you provide feedback to students?
  - b. Describe how your students respond to this feedback.
  - c. What effect does your feedback have on your students?

## Appendix F

### Feedback Letter

Dear Colleague,

Thank-you for your participation in this study. Your involvement has provided valuable information regarding the experience of a secondary school teacher using the portfolio in the classroom. An understanding of your experience has provided insight about how this tool can be used in the secondary school classroom.

The initial interview clarified your perception of the portfolio. The two training sessions allowed me to model for you how to introduce the portfolios to your classroom. The bi-weekly reflective sessions provided insight into your personal classroom experiences implementing the portfolio. The final interview allowed an understanding of your experience, as a teacher, using the portfolio in your classroom. Your personal portfolio provided further examples of your experience using the portfolio.

Feedback about the use of the data collected will be available during the month of May 2001 at the high school. An executive summary will be provided for you upon completion of the study.

I would like to thank-you for your cooperation and your time.

Sincerely,

Krista Brodersen  
Researcher



## Appendix G

## Phyllis's Participant Portfolio

**BODY IMAGE ASSIGNMENT**

COLLECT 4 PICTURES FROM VARIOUS MAGAZINES. TWO OF THE PICTURES SHOULD REPRESENT A POSITIVE BODY IMAGE AND TWO OF THE PICTURES SHOULD REPRESENT A NEGATIVE BODY IMAGE.

WRITE A ONE PARAGRAPH EXPLANATION FOR EACH PICTURE TO EXPLAIN WHY YOU THINK THAT THE PICTURE REPRESENTS A NEGATIVE OR POSITIVE BODY IMAGE.

NOTE: THIS IS YOUR OWN OPINION BUT YOU MUST BE ABLE TO DEFEND AND EXPLAIN WHY THIS IMAGE WAS SELECTED.

**EVALUATION**

THE IMAGES AND EXPLANATION WILL BE EVALUATED USING THE FOLLOWING CRITERION.

**NEATNESS** - PICTURES MUST BE CUT OUT, NOT TORN AND MOUNTED ON A SEPARATE PAGE.

**COMPLETENESS** - STATE WHETHER THIS IS A GOOD OR BAD BODY IMAGE AND WHY.

- 1) MAKE SPECIFIC REFERENCE TO THE PICTURE
- 2) EXPLAIN YOUR OPINION FULLY
- 3) INDICATE WHETHER THE IMAGE IS GOOD OR BAD

*I prepared 2 questions for each person's assignment when they were being evaluated. These questions will be included in their 30% final. The questions are unique to each person's picture selection.*

**PPL 201 F**  
**PORTFOLIO COLLECTION**

The following information must be collected and added to your portfolio file folder by:

**Friday June 1**

- 1) ***You must collect 3 items which represent your personal feelings towards fitness.***  
 Be imaginative when you select your items and remember that they are to represent your **personal** attitude. The items can be pictures from a magazine or fitness book, photographs of yourself or a family member or people doing a specific activity. You may select an award or something that represents a fitness goal or accomplishment.
  
- 2) ***Evidence of an accomplishment related to fitness.***  
 This could be a certificate or an award for participation in a physical activity (Eg. Skip-a-thon) or for winning a sporting event. You may also select a swimming certificate, refereeing certification or any other proof of involvement in an important event.
  
- 3) ***One item to show your health and lifestyle goal.***  
 This could be a picture or a written explanation. You could demonstrate a short term health and lifestyle goal or a life long, long term goal. You may want to achieve a level of health or have a healthy lifestyle like someone you know.
  
- 4) ***Pick a Role Model for Healthy Living***  
 The role model you pick does not have to be *your actual role model*. Pick someone that would be a *good* role model for healthy living. They do not have to be someone famous. Make sure you can explain why you have picked this person.

## Appendix H

### Connie's Participant Portfolio – Introduction Handouts

#### EMPLOYABILITY SKILLS PORTFOLIO

##### 1. What Is An Employability Skills Portfolio?

A collection of evidence that validates your employability skills.

##### 2. What Does It Look Like?

A three-ring binder for presentation purposes. Each submission must be in a plastic sheet protector (available at the Storm Shack) accompanied by the reflection sheet in the back of the same sheet protector.

##### 3. Why Develop An Employability Skills Portfolio?

Many employers and post-secondary institutions expect to view an applicant's portfolio at interviews as evidence of achievements and preparedness for acceptance. Although similar to other collections of works like an Art Portfolio, Writing Folders of Design & Technology drawings tube, the Employability Skills Portfolio provides samples of work-related achievements, and a record of skills to show what kind of worker you are, and how you meet employment criteria.

##### 4. Your Employability Portfolio Will Allow You To:

- prove that you have certain employability skills
- identify what skills you should work on to better prepare yourself for employment
- help you develop an effective resume
- speak positively and show proof of skills at future job interviews and help you get a job
- provide evidence of focused experiences and learning for further education

##### 5. How Is It Organized?

- Overall Title Page
- Table of Contents
- Resume
- Fundamental Skills
- Personal Management Skills
- Teamwork Skills

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\*NOTE: see next page for setup of Table of Content

## TABLE OF CONTENTS

| DOCUMENT<br>NUMBER | DOCUMENT DESCRIPTION<br>(IN ORDER OF APPEARANCE) | DOCUMENT LOCATION |               |    |   |       |
|--------------------|--|-------------------|---------------|----|---|-------|
|                    |  | RESUME            | SKILL SECTION |    |   | OTHER |
|                    |  |                   | F             | PM | T |       |
|                    |  |                   |               |    |   |       |
|                    |  |                   |               |    |   |       |
|                    |  |                   |               |    |   |       |
|                    |  |                   |               |    |   |       |
|                    |  |                   |               |    |   |       |

## 6. What Goes Into It?

Your portfolio will include school records, documents, certificates, co-op documents and reflection sheets.

**Each item** is to be accompanied by a *Reflection On Evidence* sheet. Many skills are developed through activities and are not tangible. You may use the *Reflections On Experience* sheet to describe the skill developed and place it in the appropriate section of your portfolio.

**At least two (2) entries in each of the fundamental, personal management and teamwork sections should reflect current achievements from your co-op placements.**

## 7. Who “Owns” it and Takes Care Of It?

You do! It’s your property and you are responsible for its contents and development. A portfolio is never finished—it will continue to grow as you develop and document more skills. You will continually refine it, add evidence of skills you have improved or learned and remove outdated information.

## 8. Will It Be Assessed and Evaluated?

Yes, by yourself, your teacher, your co-op supervisor(s) and by potential future employers.

9. Is It Different From My *Annual Education Plan* or *Career Planning Portfolio*?

Yes, there will be “best achievements” items which should be duplicated for your *Annual Education Plan* or *Career Planning Portfolio* when they show how you meet identified career, and/or educational goals.

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## TABLE OF CONTENTS

[illegible]

Appendix I

Connie's Participant Portfolio –Criteria

EXAMPLES OF THINGS TO PUT INTO YOUR PORTFOLIO

At the beginning, for use at school only, put the following exercises in the front of your portfolio: Evidence of Employability Skills sheets, Gaps and Goals, Reflection of Portfolio Process, Employability Profile for your job, Employability Profile for all placements (for last submission).

For your last submission, at least two (2) entries in each of the fundamental, personal management and teamwork section should reflect current achievements from your co-op placements.

| RESUME         | FUNDAMENTAL SKILLS   | PERSONAL MANAGEMENT SKILLS   | TEAMWORK SKILLS   | OTHER   |
|----------------|--|--|---|---|
| Current resume | <ul style="list-style-type: none"> <li>• Employability Skills "Reflection" Sheets (<b>must</b> be included)</li> <li>• Awards</li> <li>• Transcripts, Educational Diplomas</li> <li>• Report Cards</li> <li>• Certificates of Training/Achievement</li> <li>• Letters of recommendation from past/present co-op supervisors, employers, teachers, coaches</li> <li>• Performance Appraisal from teacher, co-op supervisor, instructors</li> <li>• Essays, reports, research and position papers, letters, articles that you wrote</li> <li>• Charts and/or graphs you created for a report</li> <li>• Pictures, sample and/or audiotapes of a completed project</li> <li>• Audio or video tapes of a speech you have given</li> <li>• Valid driver's licence, licence to operate machinery, equipment or commercial vehicles</li> <li>• Computer-generated documents you produced</li> </ul> | <ul style="list-style-type: none"> <li>• Employability Skills "Reflection" Sheets (<b>must</b> be included)</li> <li>• Letters of recommendation from past/present co-op supervisors, employers, teachers, coaches</li> <li>• Performance Appraisal from teacher, co-op supervisor, instructors</li> <li>• Interest, Aptitude and Personality Inventories (e.g. Myers-Briggs, Colours, Self-Assessment)</li> <li>• Recognition Awards (e.g. attendance)</li> <li>• Application Letters - jobs, college, university</li> <li>• Exercise Schedule</li> <li>• Certificates of Achievement and/or Participation (e.g. Red Cross, Babysitting)</li> <li>• Annual Education Plan</li> <li>• Personal Career Plan</li> <li>• Job Descriptions that required Personal Management Skills</li> </ul> | <ul style="list-style-type: none"> <li>• Employability Skills "Reflection" Sheets (<b>must</b> be included)</li> <li>• Letters of recommendation from past/present co-op supervisors, employers, teachers, coaches</li> <li>• Performance Appraisal from teacher, co-op supervisor, instructors</li> <li>• Job descriptions that required team work</li> <li>• Documentation of memberships in various organizations</li> <li>• Documentation of leadership in various organizations</li> <li>• Awards, Certificates and/or Letters of Appreciation</li> <li>• Training Certificates</li> <li>• Tapes of a speech or discussion</li> <li>• Team certificates or awards</li> <li>• Pictures demonstrating teamwork, include a written description</li> </ul> | <ul style="list-style-type: none"> <li>• Items too large for a binder may be referenced and stored elsewhere (include a description of the item and the skills that it demonstrates)</li> </ul> |

## Appendix J

## Connie's Participant Portfolio – Gaps and Goals

## GAPS AND GOALS

NAME \_\_\_\_\_

|  |                         |   |
|--|-------------------------|---|
| <b>Identify a Gap</b> —refer to your Employability Skills Profile  | <hr/> <hr/> <hr/> <hr/> |   |
| <b>Set yourself a goal following these rules.</b><br><br>Goals must be: <ul style="list-style-type: none"> <li>• specific</li> <li>• realistic</li> <li>• achievable</li> </ul> Goals must contain: <ul style="list-style-type: none"> <li>• a time frame</li> </ul> | <hr/> <hr/> <hr/> <hr/> | <b>Target Date:</b><br><hr/><br><b>Date goal achieved:</b><br><hr/> |
| <b>Assess the Difficulties</b><br><br>Identify the stumbling blocks that will get in the way of you achieving your goal. These may be at Co-op, work, school or home.  | <hr/> <hr/> <hr/> <hr/> |   |
| <b>To Achieve Goals</b><br><br>Identify the following: <ul style="list-style-type: none"> <li>• the skills you have which will help you</li> <li>• the steps you will take to achieve your goal</li> </ul>   | <hr/> <hr/> <hr/> <hr/> |   |

## Appendix K

### Connie's Participant Portfolio – Reflection on Process

#### REFLECTION ON PORTFOLIO PROCESS

Reflect on your previous experience with Portfolios. Look at the following areas:

1. your feelings on getting started;

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2. your reactions as the process continues;

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3. ideas you would share with others about portfolio concept; and

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4. ideas about “if you were to do it again”.

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## Appendix L

## Connie's Participant Portfolio – Reflection on Evidence

**REFLECTION ON EVIDENCE**

Each piece of evidence/document placed in your Employability Skills Portfolio has a purpose. Complete a Reflection on Evidence sheet to accompany each piece of evidence in your portfolio.

Document Title: \_\_\_\_\_

Document No: \_\_\_\_\_

Document Location: \_\_\_\_\_  
(R, F, PM, T or O)

Refer to your evidence chart to answer the following questions.

1. Describe the document and the skill(s) that it demonstrates.

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2. What is the significance of this document? How does this relate to your workplace? Why are you including it in your portfolio?

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## Appendix M

## Connie's Participant Portfolio – Reflection on Experience

**REFLECTION ON EXPERIENCE****(Collect, Select and Reflect)**

Often skills are gained through experience and are not tangible. Set up a page similar to the one below to reflect upon each skill you have developed for which you do not have any evidence.

Name of skill: \_\_\_\_\_

Document No: \_\_\_\_\_

Document Location: \_\_\_\_\_  
(R, F, PM, T or O)

1. Describe and thoughtfully reflect on the experience(s) that helped you gain the skill.

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2. Why are you including this reflection sheet in your portfolio?

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## Connie's Participant Portfolio – Summary Sheets

### EVIDENCE OF PERSONAL MANAGEMENT SKILLS

[illegible]



## PORTFOLIO ASSESSMENT/EVALUATION RUBRIC

|   | 1  | 2  | 3   | 4   |
|---|--|--|---|---|
| <b>KNOWLEDGE/UNDERSTANDING</b>  |  |  |   |   |
| <b>Completeness</b><br>(Overall title page, table of contents, resume, title pages for fundamental, personal management & teamwork skills, 5 items and accompanying reflection sheets for each section)   | Critical aspects of portfolio incomplete.  | Some aspects of the portfolio are incomplete which detract from the student's ability to demonstrate an application of the workplace skills in the reflections.  | Some aspects of the portfolio are incomplete but do not seriously detract from the student's ability to demonstrate an application of the workplace skills in the reflections.  | All aspects of the portfolio are complete.  |
| <b>THINKING/INQUIRY</b>   |  |  |   |   |
| <b>Organization</b><br>(Planning, selection and use of work)  | The organization of this portfolio reflects a lack of planning, appropriate selection and use of information gathered to demonstrate an understanding and development of the critical skills required in the Canadian workplace. | The organization of this portfolio reflects some effort in planning, appropriate selection and use of information gathered as a demonstration of an understanding and development of the critical skills required in the Canadian workplace. | The organization of this portfolio reflects planning, appropriate selection and use of information gathered as a demonstration of an understanding and development of the critical skills required in the Canadian workplace. | The organization of this portfolio reflects excellent planning, appropriate selection and use of information gathered as a demonstration of an understanding and development of the critical skills required in the Canadian workplace. |
| <b>Links to Employability Skills</b><br>(Demonstrates links to Fundamental, personal management and teamwork skills)  | Unable to choose appropriate demonstrations of fundamental, personal management and teamwork skills desired by the Canadian workplace.   | Demonstrations indicate some of the fundamental, personal management and teamwork skills desired by the Canadian workplace, but many gaps are evident.   | Demonstrations indicate many of the fundamental, personal management and teamwork skills desired by the Canadian workplace.   | Demonstrations show excellent understanding of the fundamental, personal management and teamwork skills desired by the Canadian workplace.  |
| <b>COMMUNICATION</b>  |  |  |   |   |
| <b>Presentation to audience</b><br>(Logical thought process, brief overview of placement, appropriate timing, attention to setup—e.g. appropriate to location, prearranged necessary equipment, confident and appropriately groomed for occasion) | Poor presentation—disjointed, not prepared, enthusiasm lacking, inappropriately groomed for occasion.  | Fair presentation—somewhat disjointed, setup not prearranged, some confidence displayed, inappropriately groomed for occasion.   | Very good presentation—adequate flow and timing, some aspect of setup not prearranged, average confidence, adequate grooming.   | Excellent presentation—logical flow, emphasis on essentials for appropriate timing, setup prearranged and ready on time, appears professional and confident.  |
| <b>APPLICATION</b>  |  |  |   |   |
| <b>Creativity</b><br>(Ideas, presentation, organization & format capture the workplace experience through authentic resources: Visual, diagrams, photos, audio etc.)  | Portfolio demonstrates a lack of creativity in providing a sense of the workplace environment.   | Portfolio demonstrates an attempt at creativity but needs further development.   | Portfolio meets all aspects of creativity but it does not capture the workplace experience.   | An excellent portfolio that creatively captures the student's workplace experience.   |

## Appendix P

### Heather's Participant Portfolio – Handout Package

#### Portfolio Project *A Handprint On My Learning*

##### **What is a *Portfolio*?**

A portfolio is a “thoughtful collection of materials that demonstrates learning and growth over time”. The portfolio itself has many purposes. The portfolio serves a purpose for meeting curriculum expectations, a tool for assessment, an evaluation strategy and a learning strategy.

##### **What I hope you will gain from portfolios?**

I hope that you all use portfolios as a learning tool and therefore transcend this learning to history class and even to learning about yourselves.

##### **What do you hope to gain from portfolios?**



##### **What will be included in your portfolio?**

Your portfolio will consists of 10 samples on which you will write a reflection. Topics for your reflection must be selected from the list below.

1. Test result (2) with a reflection on the study methods used an their effectiveness.
2. Comments on teacher teaching strategies. Teachers areas of strengths and weaknesses.
3. A work sample you are proud of.
4. A work sample you would like to improve on.
5. A reflection on your favourite assignment
6. Four reflections of your choice.



When completing your reflection use the following questions to guide you.

1. Why was the work sample chosen important to you?
2. How did this work sample influence your understanding of the topic?
3. How did this work sample help you to grow as a life long learner?
4. What goals did this work sample help you set or meet?

Furthermore, your portfolio package should have a table of contents. Your portfolio will be placed in a file folder. They will be stored in a file cabinet in the classroom.

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**Due Dates:**

Every Thursday, for 10 weeks, starting March 29, we will be spending  $\frac{1}{2}$  a class on creating a portfolio reflection. Use the following calendars to help you plan.

| MARCH 2001    |                |                  |                 |               |
|---------------|----------------|------------------|-----------------|---------------|
| <i>Monday</i> | <i>Tuesday</i> | <i>Wednesday</i> | <i>Thursday</i> | <i>Friday</i> |
| 26            | 27             | 28               | 29              | 30            |

| APRIL 2001                         |                |                  |                 |                                  |
|------------------------------------|----------------|------------------|-----------------|----------------------------------|
| <i>Monday</i>                      | <i>Tuesday</i> | <i>Wednesday</i> | <i>Thursday</i> | <i>Friday</i>                    |
| 2                                  | 3              | 4                | 5               | 6                                |
| 9                                  | 10             | 11               | 12              | 13<br><i>Good Friday Holiday</i> |
| 16<br><i>Easter Monday Holiday</i> | 17             | 18               | 19              | 20                               |
| 23                                 | 24             | 25               | 26              | 27                               |

| MAY 2001                          |                |                  |                 |               |
|-----------------------------------|----------------|------------------|-----------------|---------------|
| <i>Monday</i>                     | <i>Tuesday</i> | <i>Wednesday</i> | <i>Thursday</i> | <i>Friday</i> |
| 30                                | 1              | 2                | 3               | 4             |
| 7                                 | 8              | 9                | 10              | 11            |
| 14                                | 15             | 16               | 17              | 18            |
| 21<br><i>Victoria Day Holiday</i> | 22             | 23               | 24              | 25            |
| 28                                | 29             | 30               | 31              | 1             |



## Appendix Q

## Heather's Participant Portfolio – Assessment Criteria

**Assessment:**

Instead of receiving marks, you will be given certificates of participation based on the average level of achievement you receive. Refer to the evaluation rubric. The portfolios will be collected and read by myself. We will also discuss some of our samples in-group conferences.

| Criteria                 | Level 1<br>Certificate of Participation with bronze seal.   | Level 2<br>Certificate of Participation with Silver Seal.  | Level 3<br>Certificate of Participation with Gold Seal.  | Level 4<br>Certificate of Participation with Gold Seal. Reference Letter for Personal Portfolios   |
|--------------------------|---|--|--|--|
| Completeness             | <ul style="list-style-type: none"> <li>Requested work samples and reflection sheets are incomplete</li> <li>table of contents is incomplete</li> <li>the folder lacks organization</li> </ul>   | <ul style="list-style-type: none"> <li>all requested work samples are included with 7 of 10 reflections completed</li> <li>table of contents is complete</li> <li>the folder lacks organization</li> </ul>   | <ul style="list-style-type: none"> <li>all requested work samples and reflections are complete</li> <li>table of contents is complete</li> <li>the folder is organized (reflection sheets are attached to appropriate work samples)</li> </ul>         | <ul style="list-style-type: none"> <li>all requested work samples and reflections are complete</li> <li>table of contents is complete</li> <li>the folder is organized (reflection sheets are attached to appropriate work samples)</li> <li>the portfolio package demonstrates personal creativity</li> </ul> |
| Evidence of Goal Setting | <ul style="list-style-type: none"> <li>difficulty setting goals for future learning</li> <li>difficulty setting goals for self-growth</li> <li>lacking ability to match appropriate goals for specific outcomes</li> <li>lacks evidence of achieving goals set</li> </ul> | <ul style="list-style-type: none"> <li>able to set goals for future learning</li> <li>difficulty setting goals for self-growth</li> <li>lacking ability to match appropriate goals for specific outcomes</li> <li>lacks evidence of achieving goals set</li> </ul> | <ul style="list-style-type: none"> <li>able to set goals for future learning and self-growth</li> <li>able to match appropriate goals for specific outcomes</li> <li>lacks evidence of achieving goals set</li> </ul>                                  | <ul style="list-style-type: none"> <li>able to set goals for future learning and self-growth</li> <li>able to match appropriate goals for specific outcomes</li> <li>evidence of achieving goals set</li> </ul>  |
| Evidence of Learning     | <ul style="list-style-type: none"> <li>difficulty in demonstrating an awareness of own learning</li> <li>difficulty in making connections between class work and global community</li> <li>does not show an appreciation of learning class work content</li> </ul>        | <ul style="list-style-type: none"> <li>somewhat able to demonstrate an awareness of own learning</li> <li>difficulty in making connections between class work and global community</li> <li>rarely shows an appreciation of learning class work content</li> </ul> | <ul style="list-style-type: none"> <li>able to demonstrate awareness of own learning</li> <li>able to make connections between class work and global community</li> <li>only sometimes shows an appreciation of learning class work content</li> </ul> | <ul style="list-style-type: none"> <li>able to demonstrate awareness of own learning</li> <li>able to make connections between class work and global community</li> <li>shows an appreciation of learning class work content</li> </ul>  |

Checklist of Completion and Personal Assessment

| Topic   | Date Completed | Level of achievement I would give myself | My personal comments on the process and written reflection | TEACHER: Level of Achievement | TEACHER COMMENTS |
|---|----------------|--|--|-------------------------------|------------------|
| Test result with comments on the study methods used and their effectiveness |                |  |  |                               |                  |
| Comments on teacher strategies – strengths and weaknesses of the teacher    |                |  |  |                               |                  |
| A work sample I am proud of   |                |  |  |                               |                  |
| My favourite piece of work  |                |  |  |                               |                  |
| A work sample I would like to improve on                                    |                |  |  |                               |                  |
| Test result with comments on the study methods used and their effectiveness |                |  |  |                               |                  |
|   |                |  |  |                               |                  |
|   |                |  |  |                               |                  |
|   |                |  |  |                               |                  |
|   |                |  |  |                               |                  |

## Appendix R

## Heather's Participant Portfolio – Introductory Lesson

**Portfolio Project**  
**Case Study**  
*Handprint On My Learning*

**Introduction procedure:**

**Part A:** Ask the students a series of questions to get them thinking about their learning and self-growth. These questions are to get them thinking that they have a large part to play in the development of their learning and self-growth.

## 1. Question Posed:

*Why is it important for students to take control of their own learning?*

## Intended Response:

☞ improving student self-esteem and ownership of their work.

## 2. Question Posed:

*Suggest ways that you, as students, could control, improve, and/or monitor your learning?*

## Intended Response:

☞ understanding what needs to be done

☞ know when and how to do it

☞ have choice to increase motivation

☞ know what is expected

☞ schedule time

## 3. Question Posed:

*What is important about setting goals for your own learning and self-growth?*

## Intended Response:

☞ setting and meeting goals increases self-esteem

☞ setting goals puts the learner in control

## 4. Question Posed:

*Suggest ways in which you could set goals for your learning and self-growth?*

## Intended Response:

☞ keep the goals small so you could actually meet them

☞ learn when and how to set goals appropriately

☞ create a check list of goals, monitoring frequently, and re-evaluating if necessary

☞ challenge yourself by setting goals that involve the people around you

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**Part B:** Once the students have come to a realization that they do have a large part in developing their own learning and self-growth, I will proceed to introduce the portfolio project. The link from Part A to Part B is that the portfolio will serve as a tool which will allow the students to develop their own learning and self-growth. I will use overhead transparencies to guide my instruction.

1. Introduce the concept of 'portfolio' by defining it.
2. Discuss with the students what I hope they will gain from completing the portfolio project.
3. Allow the students some time to think of what they might gain from completing the portfolio projects. Students will be given a chance to share their ideas at this time.
4. Discuss with the students what will be included in the portfolio.
  - (i) Topics for Reflection – students will compile a list of alternative topics that will be shared with the class.
  - (ii) Guideline Questions – I will provide an example here (Appendix A).
  - (iii) Checklist – I will provide an example here (Appendix B).
  - (iv) Table of Contents – I will provide an example here (Appendix C).
5. In conclusion, I will introduce the assessment rubric. I will explain the reward of certificates and not marks. Students will be given a chance to comment on the rubric for understanding. Students will not be giving input on the creation of the rubric. I needed to control the project so as to gain a deeper understanding of the usefulness of portfolios. In other words, I'm not ready to improvise with student input at the assessment stage. Students will get the opportunity to assess themselves and comment in group conferences. It is here that I will take notes and introduce change if necessary, but more likely, use the students ideas for future use.

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*\* portfolio show + tell*

## Appendix S

## Krista's Participant Portfolio - Rubric

FSF 2D RUBRIC FOR THE PERSONAL PORTFOLIO

|  | Level 1   | Level 2  | Level 3   | Level 4   |
|--|---|--|---|---|
| <b>Development of Communication Skills</b> | <ul style="list-style-type: none"> <li>• Sometimes uses the French language (oral) to communicate some ideas</li> <li>• Sometimes uses the French language (written) to communicate some ideas</li> </ul>   | <ul style="list-style-type: none"> <li>• Uses the French language (oral) to communicate some ideas</li> <li>• Uses the French language (written) to communicate some ideas</li> </ul>  | <ul style="list-style-type: none"> <li>• Uses the French language (oral) to communicate ideas</li> <li>• Uses the French language (written) to communicate ideas</li> </ul>   | <ul style="list-style-type: none"> <li>• Uses the French language (oral) to effectively communicate ideas</li> <li>• Uses the French language (written) to effectively communicate ideas</li> </ul>   |
| <b>Evidence of Thoughtfulness</b>          | <ul style="list-style-type: none"> <li>• Demonstrates limited awareness of own learning and growth</li> <li>• Demonstrates limited awareness of the French culture</li> <li>• Demonstrates awareness of the French language and self</li> </ul>   | <ul style="list-style-type: none"> <li>• Demonstrates some awareness of own learning and growth</li> <li>• Demonstrates some awareness of the French culture</li> <li>• Begins to explore connections between the French language and self</li> </ul>            | <ul style="list-style-type: none"> <li>• Demonstrates great awareness of own learning and growth</li> <li>• Demonstrates great insight into the French culture</li> <li>• Makes connections between the French language and self</li> </ul>                 | <ul style="list-style-type: none"> <li>• Demonstrates exceptional awareness of own learning and growth</li> <li>• Demonstrates exceptional insight and application of the French culture</li> <li>• Applies connections between the French language and self</li> </ul>                         |
| <b>Organization</b>                        | <ul style="list-style-type: none"> <li>• Table of Contents lists some portfolio contents</li> <li>• Connection between samples and reflections is sometimes obvious</li> <li>• Container includes some material</li> <li>• Student struggles with portfolio review preparation</li> </ul> | <ul style="list-style-type: none"> <li>• Table of Contents lists portfolio contents</li> <li>• Samples are sometimes connected to a reflection</li> <li>• Container houses materials</li> <li>• Student is most always prepared for portfolio reviews</li> </ul> | <ul style="list-style-type: none"> <li>• Table of Contents indicates portfolio organization</li> <li>• Samples are connected to a reflection</li> <li>• Container displays materials</li> <li>• Student is always prepared for portfolio reviews</li> </ul> | <ul style="list-style-type: none"> <li>• Table of contents effectively outlines portfolio organization</li> <li>• Samples are clearly connected to a reflection</li> <li>• Container effectively displays material</li> <li>• Student is always prepared early for portfolio reviews</li> </ul> |

## Appendix T

## Krista's Participant Portfolio – Teacher-Student Conference

FSF 2D PORTFOLIO ASSESSMENT

Student: \_\_\_\_\_ Date: \_\_\_\_\_

| Criterion  | Level 1 | Level 2 | Level 3 | Level 4 |
|--|---------|---------|---------|---------|
| <b>Development of Communication Skills</b> <ul style="list-style-type: none"> <li>Communicates orally</li> <li>Communicates in writing</li> </ul>  |         |         |         |         |
| <b>Evidence of Thoughtfulness</b> <ul style="list-style-type: none"> <li>Aware of own learning and growth</li> <li>Aware of the French culture</li> <li>Aware of the French language and self</li> </ul> |         |         |         |         |
| <b>Organization</b> <ul style="list-style-type: none"> <li>Table of contents</li> <li>Sample and Reflection is connected</li> <li>Container</li> <li>Prepared for review</li> </ul>                      |         |         |         |         |

Teacher Comments:

## Appendix U

## Krista's Participant Portfolio – Self-Assessment Checklist

FSF 2D PORTFOLIO ASSESSMENT

Student: \_\_\_\_\_ Date: \_\_\_\_\_

| Criterion  | Level 1 | Level 2 | Level 3 | Level 4 |
|--|---------|---------|---------|---------|
| <b>Development of Communication Skills</b> <ul style="list-style-type: none"> <li>Communicates orally</li> <li>Communicates in writing</li> </ul>  |         |         |         |         |
| <b>Evidence of Thoughtfulness</b> <ul style="list-style-type: none"> <li>Aware of own learning and growth</li> <li>Aware of the French culture</li> <li>Aware of the French language and self</li> </ul> |         |         |         |         |
| <b>Organization</b> <ul style="list-style-type: none"> <li>Table of contents</li> <li>Sample and Reflection is connected</li> <li>Container</li> <li>Prepared for review</li> </ul>                      |         |         |         |         |

Student Comments

What I really like about my portfolio:

What I would like to work on for next time:

## Appendix V

## Krista's Participant Portfolio – Peer Conference Form

## Les Portfolios - Réaction de Pair

1. Choisissez un partenaire.
2. Partagez votre portfolio avec ce partenaire.
3. Discutez de vos portfolios.

Nom : \_\_\_\_\_

Nom du partenaire : \_\_\_\_\_

Date : \_\_\_\_\_

Les exemples que je critique s'appellent : 1. \_\_\_\_\_

2. \_\_\_\_\_

### Comment commencer à discuter?

- J'aime ...
- Tu as montré que tu comprends ...
- Quelque chose qui a captivé mon attention est ...
- Je peux m'identifier avec ...
- Je ne comprends pas ...

### Questions à Répondre

1. Est-ce qu'il y a une question que vous aimerez poser?
2. Est-ce qu'il y a quelque chose avec qui vous pouvez vous identifier?
3. Nommez une chose que tu as appris à propos de votre partenaire.



## Appendix W

## Brock Ethics Approval Form




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 Brock University
 

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Senate Research Ethics Board

Extensions 3205/4315, Room C315

**FROM:** David Butz, Chair  
 Senate Research Ethics Board (REB)

**TO:** Vera Woloshyn, Education  
 Krista Brodersen

**FILE:** 00-106, Brodersen

**DATE:** December 14, 2000

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The Brock University Research Ethics Board has reviewed the research proposal:

*"Understanding the Portfolio as an assessment strategy"*

The Subcommittee finds that your proposal conforms to the Brock University guidelines set out for ethical research.

**\*Accepted as is**

Please note: Changes or Modifications to this approved research must be reviewed and approved by the committee. Please complete form #5 - *Request for Ethics Clearance of a Revision or Modification to an Ongoing application for Ethics Review of Research with Human Participants* and submit it to the Chair of the Research Ethics Board. You can download this form from the Office of Research Services or visit the web site:  
<http://www.BrockU.CA/researchservices/mainethicsformpage.html>

DB/ge